A LOOK AT THE MARKET FOR TRAVEL TO ALBERTA IN WEST COAST US MARKETS

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Prepared by:

Davidson-Peterson Associates
A Division of Digital Research, Inc.
201 Lafayette Center
Kennebunk, ME 04043

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Introduction

Background and Intent

Metropolitan areas of the three West Coast U.S. states contribute importantly to visitation in Alberta. Washington, Oregon, and California account for nearly one-quarter of all visitors to Alberta and one-fifth of the money spent by visitors to the Province. Clearly the region is of major importance to the future of tourism in Alberta.

Alberta Economic Development wishes to base future marketing and business plans on a solid understanding of the travelers in these Western U.S. markets who could be prospects for travel to Alberta in the next few years. This study is directed toward providing this understanding.

Research Objectives

The overall goal is to provide a detailed picture of the prospective West Coast tourist market for Alberta. The specific objectives of this research study are:

- To understand the recent travel patterns – trips taken, destinations visited, mode of travel;
- To explore attitudes toward future travel related to their perceived economic situation as well as their feelings about terrorism and fear of flying;
- To explore the image of Alberta as a tourism destination – vacation experiences believed to be available as well as ease of access by car or plane;
- To segment the target market on the basis of shared patterns of travel benefits desired and travel behavior in order to identify strategic and tactical directions for marketing Alberta most effectively; and
- To provide a demographic and psychographic profile of the target market segments.

In sum, our goal is to provide an in-depth look at the market for Alberta tourism in key West Coast metropolitan areas, suggest segments to focus marketing efforts on, and strategies and tactics for increasing Alberta visitation from those segments.

Research Method

A. Sample and Data Collection

To accomplish the goals of this research effort, Davidson-Peterson Associates used the Greenfield Online Panel to collect the data. Greenfield Online maintains a panel of more than 1.5 million members across the United States. The panel members agree to complete a series of online surveys. Greenfield Online can balance the sample to represent the desired universe – from all US households to specific geographic areas included in a given survey.

For this survey, Greenfield Online sampled households in the seven DMAs which constitute households in the prospective U.S. target market area for tourism to Alberta. A total of 1,370 interviews were completed by panelists – 370 more than the suggested sample of 1,000 in order to provide a more robust sample for sub-group analyses.

As expected, the proportion of interviews conducted in each market area does not match the actual proportion of households each DMA represents within the *combined total* of the specified target market area (based on U.S. Census data). Therefore, we applied weighting techniques to achieve the desired balance in the total sample.

The table on the following page shows the distribution over the DMAs for the following:

- The proportion of the total household population in each DMA (first column);
- The number of interviews completed in each DMA (second column);
- The weights applied to the interviews to balance the sample to the desired number of interviews in each DMA (third column); and

- The number of interviews in the balanced sample (fourth column) so that the proportion matches the household population in each DMA (as shown in the first column).

With this modest weighting, then, the study is based on a sample of respondent households which is directly proportional to that found in the U.S. target market universe for Alberta tourism marketing.

Table I-1
DMA Weights

DMA	Household Proportion	# of Completes	Weights	Balanced Completes
Seattle, Washington	21%	252	1.163	293
Spokane, Washington	5%	146	0.465	68
Portland, Oregon	13%	251	0.734	184
Eugene, Oregon	3%	82	0.477	39
San Francisco, California	32%	307	1.426	438
Orange County, California	12%	182	0.928	169
San Diego, California	13%	150	1.194	179
	100%	1,370		1,370

Note: Household proportions based on U.S. Census data for the specified DMA region.

B. Questionnaire

The questionnaire used to gather the data for this study was self-administered online, containing a variety of questioning approaches including:

- **Screening** questions to ensure that all respondents had taken one or more vacation or short leisure trips to a destination outside their home state on which they stayed away from home at least two nights in the past three years, and they were personally involved in the selection of the destinations for those trips and annual household income was $40,000 or more;

- **Travel patterns** – number of overnight pleasure trips taken out-of-state and for each trip taken: date (month/year) of trip, primary destination, length of stay, mode of major travel, and purpose of trip;

- **Benefits desired** in leisure travel;

- **Travel destination awareness of and visitation to** specific states and provinces;
- **Alberta travel product** – perceptions of, knowledge about, and interest in Alberta as a travel destination;
- **Psychographic** attitude statements; and
- **Demographic** characteristics including respondent age, gender, and education, household size/composition, and household income.

Greenfield Online sent an e-mail message to 17,411 panelists inviting them to participate in this research study and providing instructions for accessing the survey online. The survey was posted online from March 12, 2004 through March 24, 2004. In total 4,945 panelists responded to the survey during this timeframe, yielding a response rate of 28%.

Among the 4,945 who responded to the survey:

- 1,370 qualified based on the screening criteria outlined above and completed the entire questionnaire (28%);
- 1,536 qualified but did not complete the entire questionnaire (31%); and
- 2,039 did not qualify for the survey (41%).

All usable completes were processed and tabulated by Davidson-Peterson Associates.

A copy of the questionnaire may be found in the Appendix.

C. Statistical Analysis

The multivariate statistical procedures required to segment the West Coast market for Alberta travel were accomplished by our consultant, Damon Ragusa of ThinkVine. The analyses used included:

- A factor analysis of the items in the travel benefits question;
- A cluster analysis using the individual factor loadings to group respondents holding shared patterns – essentially those desiring similar benefits from travel;

- A discriminant function analysis to learn whether the cluster solution was generalizable to others;
- Statistical tests to judge the solidity and reliability of the segments;
- A factor analysis of the items in the Alberta image question; and
- A key driver analysis to determine which image dimensions contribute most strongly to an individual's likelihood of visiting Alberta in the future.

Details of the output of these analyses as they guide the findings of this segmentation study may be found in Chapters III, IV and V of this report.

D. Data Tabulation

All questions have been tabulated in total and cross tabulated with the following banner specifications:

- Area of residence (DMA);
- Frequency of overnight, out-of-state leisure travel;
- Awareness of Alberta;
- Prior visitation to Alberta;
- Future intent to visit Alberta; and
- The benefit segments.

A full set of detailed tabulations has been forwarded to Travel Alberta under separate cover.

Highlights of the Findings: A Management Summary

Introduction

Travelers from the U.S. West Coast states make an extremely important contribution to visitation to Alberta and they will be important in growing tourism in the future. Alberta Economic Development commissioned Davidson-Peterson Associates to conduct an online market study among leisure travelers in seven West Coast cities to provide insights into how to reach these important travelers with a compelling Alberta message. Survey participants had to have annual household incomes of $40,000 or more, have traveled out of their home state on a leisure trip lasting at least two nights during the past three years, and participate in the travel destination selection decisions for their households.

Greenfield Online emailed invitations to 17,411 panelists in the seven DMAs to participate in the survey of which some 4,945 (28%) visited the survey site. Of those, 2,039 or 41% did not qualify according to our requirements. Of the balance, 1,370 or 28% completed the questionnaire and 1,536 (31%) did not. The final sample was balanced based on the household population of the seven DMAs so that the total sample represents the sum of the seven areas in their proper proportion. The survey was online from March 12-24, 2004.

The Findings

Our findings from this survey of West Coast target markets may be summarized as follows:

1. *Leisure Travel Patterns*

- **Leisure travel frequency varies widely**. On average, travelers from the West Coast markets have taken five overnight leisure trips out of state in the past three years. Travel frequency varies considerably, however, from one or two trips to 11 trips in three years. Frequency of such travel varies positively with educational attainment and income and negatively with the presence of children.

- **West Coast travelers today do not appear to be giving up air travel as a result of 9/11.** Most agree that they are not afraid and just fly where they want to go on vacation. Lack of fear of flying also correlates positively with frequency of leisure travel – the more one travels the less likely he/she is to express fear of flying even in these dangerous times. Only a small minority say they are driving longer distances or staying in the U.S. since the tragedy of 9/11.

- **Perception of the household's financial future does impact travel frequency.** Those who travel often are more positive about their future than are those who travel less frequently.

- **The major competition for leisure visits to Alberta is other U.S. destinations.** Trips taken by West Coast travelers were most often to other states in the U.S. Only one trip in twenty was to Canada and less than one in 100 was to Alberta.

2. Alberta's Awareness, Visitation and Product Knowledge

- As anticipated, **British Columbia is more widely known and visited by West Coast travelers than is Alberta**.
  - More think of British Columbia than Alberta as a vacation destination (75% vs. 58%);
  - More have visited BC than Alberta (46% vs. 15%);
  - More say they want to visit BC than Alberta in the future (27% vs. 8%); and
  - More describe BC's beautiful natural environment than Alberta's (40% vs. 22%).

- Most West Coast travelers recognize a number of different sites in Alberta but half also incorrectly identify a site elsewhere as being in Alberta. Best known and most likely to be visited in the future are Edmonton and Calgary as well as places in the Rocky Mountains such as Lake Louise, Banff and Jasper.

3. Alberta's Image

- **The Alberta image as a travel destination focuses on the beauty of the mountains.** Impressions of what is above average in Alberta are those passive activities designed for visitors to enjoy the natural beauty of the mountains – Canadian Rockies, spectacular scenery, Aurora Borealis, seeing wildlife, hiking and taking rail excursions in the mountains.

- **Outdoor sports activities – especially those undertaken in the mountains – also describe Alberta.** Travelers view Alberta as a better than average place to go skiing, trail riding, visiting winter Olympic venues, catching trophy fresh water fish, mountain biking and white water rafting.

- Some also associate Alberta with the luxury and elegance of historic hotels, spas, fine dining, arts and cultural events, as well as mall shopping and interesting crafts.

- **Cowboys are a well known specialty of Alberta** from the Calgary Stampede to seeing cowboys and rodeos and following cowboy trails.

4. Image Drivers of Visit Intent

- **The image attributes which drive a positive intent to visit Alberta are the best known mountain scenery and activity attributes** – the Canadian Rockies, Aurora Borealis, spectacular scenery, winter Olympic venues, hiking in the mountains, white water rafting and skiing at world class resorts. Additionally, positive interest is driven by the Calgary Stampede, and arts or cultural events as well as by learning about coal mining and exploring oil fields. These natural resources are not prevalent on the West Coast and may be more unique and therefore appealing to residents in that area.

- Interestingly, **the attribute most likely to drive positive interest is, however, ease of access to places within Alberta once in the province**. Travelers who are comfortable that they can get around are more positive to the idea of visiting Alberta than are those who are not so comfortable.

- Communicating to the large proportion of West Coast travelers who are not now interested in visiting Alberta that the province offers opportunities to see cowboys and rodeos is the one idea most likely to convince them even to consider a visit.

- Those not now interested in visiting also need to be convinced that it is easy to get to Alberta by car or by plane before the province will be a place they will consider. In addition, they want to know that there are reasonably priced meals and accommodations – not that they can stay in elegant resorts or spas.

- **Image attributes that do not distinguish likely visitors and non-visitors are those that travelers can participate in at other destinations** – golf courses,

amusement and water parks, historic hotels, spas, big city excitement, shopping malls, lake swimming or road bicycling. Others that do not distinguish these groups are simply activities in which there is little interest such as dog sledding, trail riding, dinosaurs, or native American culture.

- What needs to be communicated by Alberta are the strengths of the mountains not available in other popular destinations – spectacular scenery, Rocky Mountains, Aurora Borealis and the activities which are unique to the mountains – world class skiing, white water rafting, mountain biking, rail excursions, and winter Olympic venues. Cowboys, oil fields and coal mines will draw people to other areas of the province. Emphasis also needs to be placed on the fact that it's easy to get to Alberta, to get around once there, and to eat and sleep in reasonable accommodations.

5. Travel Benefit Segments

- A travel-benefit segmentation was completed to divide the prospective travelers from the U.S. West Coast into segments or clusters based on the benefits they look for from vacations and leisure travel. The cluster analysis yielded six clusters who want to receive very different benefits when they travel. Briefly, the clusters:

  - **Travel Enthusiasts** (12%) want all the benefits of travel. They are interested in learning about other cultures, exploring other countries, sophisticated dining, interesting shopping, world class scenery and being pampered. They are frequent travelers and a third say they will visit Alberta in the future. They like Alberta's natural beauty and outdoor activities but they also see it as having better than average dining, crafts to take home, arts or cultural events, golf courses, and big city excitement.

  - **Learning/Culture Seekers** (15%) want to learn, see new sights, absorb different cultures and explore different countries. They are interested in exploring – not

just in resting or relaxing. They travel more often than others – and to more distant destinations. Their impressions of Alberta reflect the total with the exception that they are more likely to focus on cowboys and rodeos. These travelers are older men and women, often from San Francisco, who do not have children at home and do not travel to entertain them.

- **Urbane Self Indulgent Travelers** (14%) want nothing more than to rest, relax and be pampered in a variety of ways. They tend to be women without children who therefore have no interest in entertaining them while traveling. They are not interested in nature, outdoor activities, learning about other cultures or countries. They just want to slow down, chill out and pamper themselves. These travelers are less favorable toward Alberta's key strengths of natural beauty and outdoor activities. They are simply not very interested in those attributes.

- **Outdoor Adventurers** (15%) want to be active outdoors on their vacations in the natural environment. They tend to be younger men and women with or without children. They are innovators and leaders with widespread optimism about their future economic success. These travelers relax on their vacation trips by challenging their physical abilities in many ways. They especially enjoy doing so in spectacular natural scenery. Outdoor Adventurers feel Alberta delivers a better than average outdoor experience in all outdoor activity areas – such as rafting, fishing and biking. But they also give Alberta high marks for city experiences, arts or cultural events, and cowboys.

- **Family Oriented Travelers** (23%) focus all their vacation energies on entertaining and educating their children. These travelers tend to be younger women. They take vacations to educate and entertain their children as well as to reconnect and create family memories. While they also say they want to see new sights, find new and different things to do, challenge their abilities in sports and summer activities, one suspects they want to do so to share such experiences with their children.

Impressions of Alberta's attractions by this group are not distinguished in any way from the average of West Coast travelers.

- **Reluctant Travelers** (20%) seem to travel because they have to not because they want to. They are older and more likely to be women who are not leaders or innovators and not positive about the future of the economy. These travelers are much less interested in any of the travel benefits than are other travelers. They do not even want to appreciate the wonders of nature much less to learn about or explore different countries or cultures. They are not frequent travelers and they tend to stay in the U.S. rather than go elsewhere. They are less likely to fly and more likely to drive on vacation and are more likely to say they travel to visit friends and relatives. These travelers are not interested in going to Alberta and they do not hold any favorable views of the province.

Our Conclusions

Findings that should inform the communications strategies for West Coast travel markets:

- Alberta is widely known but that awareness has not been translated into visitation for many. Triggering a decision to visit now should be the goal of at least some of the communications.

- What differentiates travelers who say they will visit Alberta from others are the unique natural attributes of the mountains – Canadian Rockies, Aurora Borealis, spectacular scenery, hiking in the mountains. But the beauty of the environment has to be translated into a compelling reason to visit.

    - For many, that can be done by emphasizing the activities in the mountains which enable one to enjoy the setting – hiking, skiing, mountain biking, white water rafting.

    - Others may need the special intrigue of other activities completely foreign to the West Coast of the U.S. such as seeing cowboys, following cowboy trails, exploring oil fields and learning about coal mines to find themselves more interested in visiting Alberta where they can also enjoy the spectacular scenery.

    - For still others, we may need to illustrate the foreigness of Alberta by emphasizing the cultural differences within the special natural environment and showing aspects of the earliest native American civilizations through the current lively city life in Calgary and Edmonton.

- The six travel benefit segments should receive different levels of attention in communications.

  - **Reluctant Travelers** can simply be ignored. They hold little or no potential for Alberta.

  - **Family Oriented Travelers** might also be ignored. If not, special programs could be designed to help parents entertain and educate their children in Alberta. In our judgment, however, it appears unlikely that most of these travelers will spend the extra time and money necessary to entertain and educate their children in Alberta when they might easily do so closer to home.

  - An appeal might be made to the **Urbane Self Indulgent Travelers** with special spa programs at resorts specializing in "pampering" their clients. Fine dining, interesting shopping, and spa activities in elegant properties with a view of the spectacular natural scenery might offer this group a reason to "chill out" in Alberta.

  - **Outdoor Adventurers** might be intrigued by a variety of challenging physical activities in the natural mountain environment. The focus should be on the benefits of challenging oneself – not on the specific details of each type of activity. The point would be to show Alberta as the place where everyone can challenge his/her own abilities – from the neophyte path walker to the mountain climber; from the canoeist on a gentle lake to the white water rafter on a wild stream, from the skier on the bunny slopes to the expert crashing down the black diamond trails. Alberta is positioned as the place where you can be yourself, express yourself, challenge yourself and win in activities set in an amazing natural environment. With the focus on the personal challenge, the same communications can be

used to reach all types of outdoor activity buffs without having to design a special execution for each activity.

- Alberta can address the **Learning/Culture Seekers** by positioning the province as a place where one can learn the unexpected, the different, the new ideas -- about earlier civilizations, about the cultures of the Ukraine and other lands whose residents settled in Alberta, and even about cowboys, oil extraction and coal mining. These travelers want to learn and grow in many different directions with the goal being to know more when they go home. What will make the Alberta learning experience wonderful is to learn something different – something that is unique to Alberta.

- **Travel Enthusiasts** are, to put it simply, enthusiastic travelers. They travel because they are interested in learning, growing, and enjoying the spectacular natural environment. They will likely be intrigued by the approach designed to reach the Learning/Culture Seekers into visiting Alberta.

All the communications designed to reached these travel benefit segments should be directed to addressing what these travelers want from travel. Selling Alberta to each of them will be most effectively accomplished by communicating that Alberta can provide the emotional benefits what they want to gain from travel.

The Findings in Detail

I. The West Coast Market for Alberta

Introduction

The purpose of this Chapter is to review the market for travel to Alberta residing in the seven DMAs to which Travel Alberta's marketing efforts may be directed. In doing so we will look at:

- Travel frequency;
- Target market areas;
- Demographic characteristics;
- Psychographic descriptors; and
- Recent travel patterns.

A. Travel Frequency

Out-of-state leisure travel frequency varies dramatically among target market members.

- **Frequent travelers** – those who took seven or more out-of-state leisure trips in the past three years – represent 22% of target market area travelers and 43% of trips taken. On average they have taken 11.77 trips out of state in the past three years, suggesting that they typically travel four times a year to a destination outside of their home state for leisure travel purposes.

- **Moderate travelers** have taken three to six out-of-state leisure trips in the past three years (50%). On average they have taken 4.17 out-of-state leisure trips in those three years, each averaging one or two such trips a year. Travel by this large group accounts for 47% of all of the out-of-state leisure trips taken by those in the target market areas in that period.

- **Light travelers** – those who took only one or two trips in the past three years – represent one quarter of all target market area travelers (27%) and only 10% of the trips taken. On average, they took only one or two trips in the most recent three-year period (1.58).

Table 1-1
Out-of-State Travel (Weighted)
(Past Three Years)

	Travelers		Trips Taken
Base:	**1,370**		**5,963**
	%	**Mean**	**%**
Frequent Travel (7 or more trips)	22	11.77	43
Moderate Travel (3 to 6 trips)	50	4.17	47
Light Travel (1 to 2 trips)	27	1.58	10
Total		5.16	

B. Target Market Areas

With very few exceptions, frequency of travel is similar in all of the target market areas. Heavy travelers are found a little more often in Seattle (26% vs. 21% of total) and light travelers are found a little more often in San Francisco (37% vs. 32% of total). Elsewhere there are no significant differences by travel frequency.

Table 1-2
West Coast Target Market Areas (Weighted)

Base:	Total 1,370	Out-of-State Trip Volume		
		Frequent (7 or more) 306	Moderate (3 to 6) 687	Light (1 to 2) 375
Washington				
Seattle	21%	26%	21%	19%
Spokane	5	3	6	5
Oregon				
Portland	13	12	13	15
Eugene	3	2	3	4
California				
San Francisco	32	33	29	37
Orange County	12	13	14	9
San Diego	13	12	15	10

Note: Shaded percents/means are significantly different from others at the 95% confidence level.

C. Demographic Characteristics of Potential Alberta Visitors

Travel frequency is correlated with educational attainment, level of affluence, and the absence of children at home – but not with other demographic characteristics. College graduation is more prevalent as travel frequency increases (45%, light; 51%, moderate; and 57%, high). Similarly, average annual household income increases with travel frequency ($76.8 thousand, light; $85.1 thousand, moderate; and $91.6 thousand, heavy). Presence of children at home is less prevalent as travel increases (52%, light; 42%, moderate; and 36%, frequent).

Regardless of travel frequency women represent nearly two thirds of the travel decision makers in these households where out-of-state leisure trips are taken. On average, target-market travelers are 42 years of age with little difference by travel frequency.

Table 1-3
Demographic Characteristics of the Alberta Tourism Market (Weighted)

Base:	Total 1,370	Out-of-State Trip Volume		
		Frequent (7 or more) 306	Moderate (3 to 6) 687	Light (1 to 2) 375
Gender				
Male	38%	35%	37%	40%
Female	62	65	62	60
Age				
18-29	16%	15%	17%	15%
30-39	29	29	30	28
40-49	25	23	23	30
50-59	20	20	20	20
60 or more	9	12	9	7
Mean age	**42.38**	**43.27**	**42.06**	**42.17**
Household Size				
Have children at home	43%	36%	42%	52%
Younger than six	19	15	18	23
Six – twelve	22	19	22	26
Thirteen – eighteen	17	13	16	23
No children	57	64	58	48
Mean household size	**2.87**	**2.62**	**2.87**	**3.07**

Note: Shaded percents/means are significantly different from others at the 95% confidence level.

Table 1-3 (continued)
Demographic Characteristics of the Alberta Tourism Market (Weighted)

Base:	Total 1,370	Out-of-State Trip Volume		
		Frequent (7 or more) 306	Moderate (3 to 6) 687	Light (1 to 2) 375
Education				
High school or less	9%	4%	10%	11%
College experience	40	37	38	45
College graduate	51	57	51	45
Annual Household Income				
$40,000 to $49,999	14%	8%	14%	17%
$50,000 to $74,999	35	32	33	40
$75,000 to $99,999	23	25	23	22
$100,000 or more	27	36	29	18
Mean income (000's)	**$84.2**	**$91.6**	**$85.1**	**$76.8**

Note: Shaded percents/means are significantly different from others at the 95% confidence level.

D. Psychographic Descriptors of Potential Alberta Visitors

Some 15 lifestyle, values, and orientation statements were used to obtain a brief psychographic profile of the potential market for Alberta. Respondents were asked how much they agreed or disagreed with each statement using a five-point scale. Using the proportion who agree – either somewhat or completely – we are able to describe the potential market in these terms.

Target market travelers hold very different views of the psychographic attributes evaluated.

- **Among users, the Internet is important to travel planning**. The vast majority agree that *The Internet is a very important source of information for planning our trips* (90%). (It should, of course, be noted that this study was conducted online so all travelers in the sample have access to the Internet.) About two thirds of the travelers agree that *We take a lot of time planning our vacation trips* (62%). And as many feel that *I'm more comfortable on the computer than others my age are* (62%).

- Most agree that *Family is the most important thing to me today* (80%). Family here clearly means extended family since many fewer travelers have children at home (43%). The majority of travelers also agree that *I wear what I'm comfortable in regardless of what's in style* (76%).

- Nearly as many agree that *To me all of this fear of flying is silly – I just fly where I want to go on vacation* (71%).

- **Being unafraid of flying correlates strongly with frequency of traveling**. Those who travel most often are most likely to agree that being afraid of flying is silly (82%) vs moderate travelers (73%) and light travelers (59%). **Importantly, the majority of all these groups feel that traveling by air is not a problem today.**

- **Travel frequency is also strongly correlated with innovation**. Frequent travelers are more likely than others to agree that *I tend to try new things before most of my friends do* (57%, frequent; 47%, moderate; and 37%, light).

- **Perceptions of their household's economic future also seem to relate to travel frequency.** In total, most agree that *I'm confident of our household's economic future* (59%). But those who travel frequently are more likely to agree (65%) than are those who do only light travel (50%).

  At the same time, perceptions of the US economy as a whole do not seem to relate to travel frequency. Only a third of travelers agree that *The economy is really beginning to pick up* (34%). One third also agree that *we've suffered from the recent economic downturn, but things are much better for us today* (32%) There are no differences in the proportion holding these views which are related to travel frequency.

- **As noted, these travelers are not afraid to fly. They are also not likely to limit their travel to driving or to staying home in the US.** Only a small minority of travelers agree that:
  - *I find we're driving longer distances on vacation than we did before 9/11 (15%);*
  - *Canada didn't support us in Iraq so I'm not going to take my vacation dollars to Canada (12%);*
  - *I plan to stay in the US, not even crossing the border to Canada during this period of security concerns (11%);*
  - *Since 9/11, we've decided to travel only to places we can drive to for vacations (10%).*

- Driving trips are not being eliminated because half the travelers agree that *We make lots of stops along the way to our vacation destination (49%).* But, as noted, many are not afraid to fly and do so.

Table 1-4
Psychographic Descriptors of Potential Alberta Visitors (Weighted)
Percent Rating: "Agree Completely/Somewhat"

Base:	Total 1,370	Out-of-State Trip Volume		
		Frequent (7 or more) 306	Moderate (3 to 6) 687	Light (1 to 2) 375
The Internet is a very important source of information for planning our trips	90%	92%	90%	90%
Family is the most important thing to me today	80	76	80	82
I wear what I'm comfortable in regardless of what's in style	76	72	78	77
To me all of this fear of flying is silly – I just fly where I want to go on vacation	71	82	73	59
I'm more comfortable on the computer than others my age are	62	65	61	62
We take a lot of time planning our vacation trips	62	63	64	55
I'm confident that our household's economic situation looks good for the future	59	65	61	50
We make lots of stops along the way to our vacation destination	49	52	47	50
I tend to try new things before most of my friends do	47	57	47	37
The economy is really beginning to pick up	34	35	38	27
We've suffered from the recent economic downturn, but things are much better for us today	32	32	33	29
I find we're driving longer distances on vacation than we did before 9/11	15	15	13	17
Canada didn't support us in Iraq so I'm not going to take my vacation dollars to Canada	12	10	12	12
I plan to stay in the U.S. not even crossing the border to Canada during this period of security concerns	11	9	10	15
Since 9/11, we've decided to travel only to places we can drive to for vacations	10	8	9	13

Note: Shaded percents/means are significantly different from others at the 95% confidence level.

E. Recent Travel

As noted, travelers in the West Coast markets have taken an average of 5.2. Trips in the past three years. Travelers were asked to provide information on destination, mode, length and reasons for destination choice for each of the trips they had taken during that time period.

Not surprisingly, **most trips taken in the past three years were to other states in the US** (81%). Canadian destination were cited for 5% of all trips and most of those were to British Columbia (4%) with Alberta receiving fewer than 1% of these travelers in the past three years. The potential for increasing travel to Alberta from these markets in huge.

On average out-of-state trips lasted 5.6 nights. Just over half of the trips were taken by air (55%) with about four in ten by car/RV/truck (39%). Other modes were used far less frequently for these trips. Note that the trips asked about included a stay of two or more nights out of state. These travelers are likely to have taken many more in-state trips, especially by car.

Fully one third of all the trips taken were for the primary purpose of visiting friends and relatives (34%). Such trips may well have increased since 9/11 because that tragedy led families to focus more on spending time with other family members. Again, more such trips may also have been taken in state.

One trip in seven is taken to enjoy scenery and natural beauty (15%) more than to participate in a recreational activity (10%). Pure relaxation is the reason for a few more trips (17%).

Table 1-5
Recent Travel: Trip Characteristics (Weighted)
(Past 3 Years)

Base: Total Trips	Total 5963	Out-of-State Trip Volume		
		Frequent (7 or more) 2560	Moderate (3 to 6) 2794	Light (1 to 2) 588
Primary Destination				
United States (Net)	*81%*	*80%*	*82%*	*85%*
Pacific Region	30	32	29	28
Mountain Region	25	23	27	31
Canadian Provinces/Territories (Net)	*5*	*6*	*5*	*4*
British Columbia	4	5	3	3
Alberta	*	*	*	*
Other Country (Net)	*13*	*13*	*13*	*11*
Mode of Major Travel				
Airplane	55%	54%	56%	54%
Car/ RV/ Truck	39	39	39	43
Cruise Ship	3	3	3	2
Reason for Destination Choice				
To visit family or friends	34%	32%	36%	36%
To relax and do nothing	17	16	18	16
To enjoy the scenery and natural beauty	15	17	14	13
To participate in a recreational activity	10	12	9	9
To watch others perform in shows or sporting events	4	3	4	6
Personal business	4	3	4	6
To learn something new	3	2	4	2
Other	12	15	10	12
Average Length of Stay	**5.6**	**5.6**	**5.5**	**5.6**

**Less than 0.5%*

Note: Shaded percents/means are significantly different from others at the 95% confidence level.

Interim Summary

The findings of this chapter may be summarized as follows:

- Long-haul leisure travel patterns by travelers in the West Coast markets for Alberta are quite varied. Some have traveled out of state for at least two nights only once or twice in three years while others do such travel at least that often every year. Frequent travelers are found more often in Seattle than would be expected while infrequent travelers are found more often in San Francisco. Otherwise, there is no difference across markets by frequency of travel.

- Educational attainment and level of affluence are positively correlated with frequency of travel. As income level and college graduation rates increase, travel frequency increases The reverse is true for the presence of children: those who travel least are most likely to have children at home.

- Travelers do not seem very concerned about flying for leisure purposes today. Few say they are driving more on vacation or are not leaving the country due to the tragedies of 9/11. At the same time, driving is still a popular means of travel for these West Coast travelers and more drive trips are probably taken in state.

- The perceived economic situation for traveling households in the target market area is correlated with frequency of travel. Those who travel frequently are more likely than those who travel less often to feel their economic future looks good. At the same time, general negative impressions of how the economy is doing today do not seem to hinder travel.

- Most travelers have traveled out-of-state but within the US in the past three years. Only 5% have traveled to Canada – mostly to British Columbia (4%) while fewer than 1% of trips have been to Alberta.

Let's look at the awareness and prior visitation of travelers to Alberta and British Columbia.

II. Awareness, Visitation, and Product Knowledge of Alberta

Introduction

The purpose of this chapter is to review where Alberta fits in travelers' destination world. In so doing, we'll look at:

- Destination awareness;
- Prior visitation;
- Likely future visitation; and
- Product knowledge for Alberta

We'll begin with a look at destination awareness.

A. Awareness of Alberta as a Travel Destination

More West Coast travelers are familiar with U.S. than with Canadian destinations. Virtually all travelers in the target market areas cite at least one state in the Pacific and Mountain regions as a travel destination (99%). Fewer – though still a large majority – think of the western Canadian provinces/territories as a travel destination (81%).

In these West Coast markets, California is the state best known as a travel destination (97%). Oregon and Washington are also mentioned by nine travelers in ten (88%). As a destination area, Florida (over on the East Coast) is as widely known (82%) as Hawaii (84%) or Colorado (82%) as a vacation destination.

Most West Coast travelers are familiar with both British Columbia and Alberta. West Coast travelers are most likely to say they know British Columbia as a destination (75%). Alberta is mentioned by fewer– though still a majority of travelers as a vacation destination (58%).

Table 2-1
Destination Awareness (Weighted)
(Aided)

Base: Total respondents	Total 1,370	Out-of-State Trip Volume		
		Frequent (7 or more) 306	Moderate (3 to 6) 687	Light (1 to 2) 375
Canadian Provinces/Territories (Net)	*81%*	*88%*	*81%*	*77%*
British Columbia	75	83	73	71
Alberta	58	63	59	53
Northwest Territories	53	57	53	51
Yukon	48	51	47	46
Saskatchewan	45	50	46	40
US States (Net)	*99*	*100*	*100*	*99*
Pacific Region				
California	97	98	98	95
Oregon	88	90	88	86
Washington	88	91	87	87
Hawaii	84	85	85	82
Alaska	79	82	80	77
Mountain Region				
Colorado	82	88	82	78
Idaho	75	78	74	74
Utah	75	80	74	72
Montana	75	78	75	73
Wyoming	70	72	69	69
Other Region				
Florida	82	87	82	79
Texas	79	85	80	75

Note: Shaded percents/means are significantly different from others at the 95% confidence level.

B. Prior Visitation

While all West Coast travelers have traveled within the US, only half have visited Canada. When asked to indicate in which states or provinces/territories they had ever

traveled for leisure, the vast majority again cite a state in the pacific or mountain region of the US. Only about half as many say they have ever visited the western Canadian provinces/territories (53%).

Not surprisingly, in nearly all cases frequent travelers are more likely to have visited each state than are infrequent travelers. For more distant states (Florida and Texas) prior visitation varies directly with travel frequency.

Although awareness of Alberta is close to that of British Columbia, many fewer West Coast travelers have actually been to Alberta than to British Columbia. About three times as many West Coast target market travelers have visited British Columbia (46%) as have visited Alberta (15%). Prior visitation to Alberta is also highly correlated with travel frequency. Frequent travelers are more likely to have visited Alberta (21%) than are moderate (14%), and light travelers (10%).

Table 2-2
Prior Leisure Trip Destinations (Weighted)
(Aided)

Base: Total respondents	Total 1,370	Out-of-State Trip Volume		
		Frequent (7 or more) 306	Moderate (3 to 6) 687	Light (1 to 2) 375
Canadian Provinces/Territories (Net)	*53%*	*65%*	*53%*	*44%*
British Columbia	46	59	44	38
Alberta	15	21	14	10
Northwest Territories	13	15	13	10
Yukon	5	8	5	3
Saskatchewan	5	8	4	4
U.S. States (Net)	*95%*	*96%*	*94%*	*94%*
Pacific Region				
California	77	84	77	72
Oregon	63	70	62	57
Washington	60	69	59	55
Hawaii	52	59	53	42
Alaska	17	21	18	12
Mountain Region				
Colorado	44	56	44	37
Idaho	39	46	39	34
Utah	39	48	39	34
Montana	34	40	33	32
Wyoming	29	36	28	24
Other Region				
Florida	51	62	51	42
Texas	41	54	41	31

Note: Shaded percents/means are significantly different from others at the 95% confidence level.

C. Future Visitation

When asked to select which two or three states or provinces/territories they would most like to visit in the future, **West Coast market residents are most likely to select Hawaii (57%) or Alaska (49%).** Since half have already been to Hawaii (52%) and many fewer have been to Alaska (17%), it may be that Alaska is the next "dream" vacation for Americans on the West Coast.

Nearly half included a Canadian province/territory in their list of desired future destinations (43%). Again British Columbia is cited three times as often as Alberta for such a future trip (27% vs. 8%).

There is no difference in the pattern of destinations selected for a future trip by travel frequency. Those who travel often are as likely as others to select each of the destinations. One might hypothesize, however, that the frequent travelers will do such travel sooner than will others since they have more travel opportunities each year.

Table 2-3
Future Leisure Trip Destinations (Weighted)
(Aided)

Base: Total respondents	Total 1,370	Out-of-State Trip Volume		
		Frequent (7 or more) 306	Moderate (3 to 6) 687	Light (1 to 2) 375
Canadian Provinces/Territories (Net)	*43%*	*47%*	*44%*	*38%*
British Columbia	27	27	29	24
Yukon	9	11	9	8
Alberta	8	10	7	6
Northwest Territories	6	6	6	5
Saskatchewan	3	2	3	4
U.S. States (Net)	*92%*	*92%*	*92%*	*92%*
Pacific Region				
Hawaii	57	55	58	56
Alaska	49	50	48	52
California	14	12	14	16
Oregon	7	6	6	8
Washington	7	6	6	9
Mountain Region				
Colorado	12	11	12	12
Montana	8	11	7	9
Wyoming	5	7	3	5
Utah	3	5	2	2
Idaho	2	2	2	2
Other Region				
Florida	27	23	30	26
Texas	7	8	7	6

Note: Shaded percents/means are significantly different from others at the 95% confidence level.

D. Product Knowledge

When asked to describe Alberta as a vacation destination in their own words, West Coast travelers focus primarily on the natural environment of the province (48%). Beautiful scenery is what Alberta is best known for (22%) – but snow and cold temperatures are not far behind (14%). While specific locations are mentioned by 17%, most are simply placing Alberta in Canada (11%). Fewer mention any activities (8%) or attractions (7%) as descriptive of the province.

Among those who selected Alberta as a destination they were aware of earlier, knowledge of Alberta's natural environment is even more widespread (56% vs. 38% for those not initially aware). Aware potential travelers are more likely to mention the beauty of Alberta (27% vs. 15%), and the Rocky Mountains (12% vs. 4%) but not any more likely to mention other characteristics.

Table 2-4
Perceptions of Alberta as a Vacation Destination (Weighted)
(Unaided)

Base: Total respondents	Total 1,370	Aware of Alberta Yes 800	Aware of Alberta No 570
Natural Environment (Net)	*48%*	*56%*	*38%*
Beautiful/breathtaking/pretty/scenic	22	27	15
Snow/cold, cooler temperatures	14	14	13
Mountains/Rockies	8	12	4
Wilderness/open space/rural/remote	6	7	4
Nature/outdoors	3	3	3
Clean/pristine/natural	2	3	2
Quiet/relaxing/peaceful/serene	2	2	2
Other natural attributes	8	10	7
Specific Locations (Net)	*17%*	*19%*	*15%*
Canada/in Canada	11	11	12
Banff/Lake Louise	4	5	1
Other locations	3	4	2
Activities (Net)	*8%*	*10%*	*6%*
Winter activities	5	6	4
Warm weather activities	2	2	1
Other activities	2	2	2
Attractions (Net)	*7%*	*9%*	*4%*
Cowboys/rodeo/Calgary Stampede	4	6	2
Other attractions	4	5	2

Note: Shaded percents/means are significantly different from others at the 95% confidence level.

Table 2-4 (continued)
Perceptions of Alberta as a Vacation Destination (Weighted)
(Unaided)

Base: Total respondents	Total 1,370	Aware of Alberta Yes 800	Aware of Alberta No 570
Other			
Cultural diversity	3%	4%	3%
Friendly/nice – people	3	3	2
Nice/pleasant/fun/interesting/great/ exciting	3	4	1
Not familiar with/know nothing about/ Never heard of/don't know	16	9	26

Note: Shaded percents/means are significantly different from others at the 95% confidence level.

The pattern of vacation destination descriptors for British Columbia is not very dissimilar to that for Alberta. More see British Columbia in terms of its natural environment (59% vs. 48% for Alberta) but only half as many think of BC as cold (7% vs. 14%). Twice as many mention "beautiful" for British Columbia (40%) as do so for Alberta (22%).

Table 2-5
Vacation Destination Perceptions:
Alberta vs. British Columbia (Weighted)
(Unaided)

Base: Total respondents	Alberta 1,370	British Columbia 1,370
Natural Environment (Net)	*48%*	*59%*
Beautiful/breathtaking/pretty/scenic	22	40
Snow/cold, cooler temperatures	14	7
Mountains/Rockies	8	6
Wilderness/open space/rural/remote	6	4
Nature/outdoors	3	3
Clean/pristine/natural	2	5
Quiet/relaxing/peaceful/serene	2	3
Other natural attributes	8	14
Specific Locations (Net)	*17%*	*20%*
Activities (Net)	*8%*	*10%*
Winter activities	5	4
Warm weather activities	2	2
Other activities	2	4

Table 2-5 (continued)
Vacation Destination Perceptions:
Alberta vs. British Columbia (Weighted)
(Unaided)

Base: Total respondents	Alberta 1,370	British Columbia 1,370
Attractions (Net)	*7%*	*8%*
Cowboys/rodeo/Calgary Stampede	4	0
Gardens/flower gardens	0	4
Other attractions	4	5
Other		
Cultural diversity	3%	5%
Friendly/nice – people	3	4
Nice/pleasant/fun/interesting/great/ Exciting	3	6
Not familiar with/know nothing about/ Never heard of/don't know	16	6

Most West Coast travelers recognize places and attractions in Alberta. When travelers were shown a list of locations and attractions in Western Canada and Northwestern US and asked which were in Alberta, most could correctly identify at least one as in Alberta (79%).

Most widely known are Calgary (49%), Calgary Stampede (44%), and Edmonton (42%). About a third recognize the places associated with Banff (33%), Banff National Park (35%), and Banff Springs Hotel (32%) – or the West Edmonton Mall (31%). Although Lake Louise is correctly placed in Alberta by a quarter (23%), no other place is correctly identified with Alberta by as many as one fifth of the travelers.

Interestingly, fully half the travelers believe that some place or attraction <u>not</u> in Alberta is in the province (51%). One third of those who make incorrect associations place British Columbia sites in Alberta (36%) – primarily three very popular tourist sites in BC – Victoria (12%), Vancouver (11%), and Whistler (10%). Some West Coast travelers simply do no know where some western Canadian sites actually are.

The most often misidentified US attraction is Glacier National Park which 14% of West Coast travelers associate with Alberta.

West Coast travelers who say they are likely to visit Alberta in the next three years are much more likely to know what locations are in Alberta (92% vs. 70% of those not likely to visit). At the same time, they are also more likely to incorrectly identify locations which are not in Alberta as in the province (63% vs. 45%).

Table 2-6
Knowledge of Alberta Destinations and Attractions (Weighted)
(Aided)

Base: Total respondents	Total 1,370	Intent to Visit (Next Three Years) Positive 245	Neutral 551	Negative 561
Identified Correctly as Alberta (Net)	**79%**	**92%**	**83%**	**70%**
Calgary	49	66	51	40
Calgary Stampede	44	57	47	35
Edmonton	42	53	44	36
Banff National Park	35	52	39	25
Banff	33	49	37	24
Banff Springs Hotel	32	46	35	23
West Edmonton Mall	31	45	32	25
Lake Louise	23	40	25	15
Jasper National Park	18	33	18	12
Jasper	16	29	16	9
Red Deer	10	19	8	9
Dinosaur Provincial Park	10	18	9	7
Waterton Lakes National Park	8	16	7	6
Lethbridge	8	15	7	5
Canmore	5	12	5	3
Grande Prairie	5	7	6	4
Elk Island National Park	5	7	5	5
Drumheller	4	9	3	3

Note: Shaded percents/means are significantly different from others at the 95% confidence level.

Table 2-6 (continued)
Knowledge of Alberta Destinations and Attractions (Weighted)
(Aided)

Base: Total respodents	Total 1,370	Intent to Visit (Next Three Years) Positive 245	Neutral 551	Negative 561
Identified Incorrectly as Alberta (Net)	**51%**	**63%**	**54%**	**45%**
In British Columbia (sub-net)	*36*	*44*	*38*	*31*
Victoria	12	16	11	10
Vancouver	11	14	12	10
Whistler	10	12	12	8
Kamloops	7	9	8	4
Empress Hotel	6	9	8	4
Butchart Gardens	6	10	5	4
Powell River	3	3	2	3
West Coast Trail	2	5	2	1
Port Moody	2	3	2	1
In U.S. (sub-net)	*24*	*36*	*25*	*20*
Glacier National Park	14	27	14	10
Olympic National Park	7	10	7	6
North Cascades National Park	5	6	5	4
Grand Teton National Park	4	8	4	3
Crater Lake National Park	4	7	4	2
In Saskatchewan (sub-net)	*13*	*15*	*15*	*11*
Saskatoon	8	8	10	7
Regina	6	9	7	5

Note: Shaded percents/means are significantly different from others at the 95% confidence level.

West Coast travelers were shown a map of Alberta with major cities identified and asked to indicate which they would like to visit if they were to go to Alberta.

The best-known Alberta destinations are also the most popular ones for a future trip. Calgary is selected by nearly two-thirds of the target market travelers as a destination they would like to visit in Alberta (63%). About half select Edmonton (51%), Lake Louise (50%) or Banff (49%). While Jasper is selected by a third as a destination they would like to visit (33%), no other location is selected by as many as one fifth of the travelers.

Table 2-7
Places Might Like to Visit in Alberta (Weighted)

Base: Total respondents	Total 1,370	Out-of-State Trip Volume		
		Frequent (7 or more) 306	Moderate (3 to 6) 687	Light (1 to 2) 375
Calgary	63%	67%	64%	60%
Edmonton	51	46	54	49
Lake Louise	50	58	47	47
Banff	49	61	48	42
Jasper	33	41	32	29
Medicine Hat	19	23	18	20
Red Deer	18	22	16	18
Grande Prairie	17	19	16	18
Fort McMurray	16	18	15	16
Lethbridge	9	9	8	8
Drumheller	5	8	4	5
Other	4	2	4	5

Note: Shaded percents/means are significantly different from others at the 95% confidence level.

Interim Summary

The findings of this chapter may be summarized as follows:

- Most West Coast travelers are aware of Alberta as a vacation destination and only a few more mention British Columbia.
- However, in both prior visitation and likely future visitation, British Columbia is likely to be mentioned three times as often as is Alberta.
- Both provinces are known for their natural beauty and scenery. Alberta is more often associated with snow and cold than is British Columbia.
- Most travelers can correctly identify at least one city, place or attraction as in Alberta. At the same time, half also incorrectly place cities and attractions from elsewhere in western Canada or the US in Alberta.
- Travelers are most likely to say they will visit the major cities as well as the major National Park destinations – Banff, Lake Louise, and Jasper – from a map of the province.

Let's turn now to the image of Alberta as a vacation destination.

III. Image of Alberta and an Alberta Trip

Introduction

The purpose of this chapter is to explore what West Coast travelers know about Alberta as a vacation destination in more depth and to determine what attitudes and views contribute to a positive interest in visiting Alberta. A battery of attributes describing various types of activities that could be enjoyed in Alberta was provided to travelers. Travelers were asked to evaluate Alberta as a place to do each activity. The scale used was:

Alberta is:

- The very best place to do that;
- One of the best places;
- Better than most places;
- About average;
- Not as good as most places; and
- One of the worst places.

As a first step, we completed a factor analysis of the 39 attributes to learn which ones "go together", or are rated similarly by respondents. Then we used a key driver analysis to learn which attributes drive positive interest in visiting Alberta.

We'll begin our analysis of Alberta's activity image by looking at the factor analysis results.

A. Factor Analysis

The five-factor solution was selected as the strongest representation of the structure of the image ratings data. The five factors with their loadings are:

	Factor Loadings
Factor 1: Nature Experiences/Outdoor Activities	
Hike through beautiful mountain areas	0.752
Enjoy spectacular scenery	0.734
See a variety of wildlife	0.710
Ski at world-class resorts	0.702
See the Canadian Rockies	0.691
Take rail excursions in the mountains	0.651
Experience the Northern Lights (Aurora Borealis)	0.618
Catch a trophy freshwater fish	0.610
Go mountain biking	0.581
Go trail riding on horseback	0.576
Go dog sledding	0.574
Enjoy the challenge of white water rafting	0.567
Visit winter Olympic venues	0.562
Cruise on inland lakes	0.537
Go road/tour bicycling	0.503
Swim in lakes	0.405
Learn about Native American culture at historic sites	0.387
Factor 2: Upscale Activities/Easy Access	
Enjoy the excitement of a big city experience	0.789
Enjoy fine dining experiences	0.742
Attend arts or cultural events	0.665
Shop and be entertained at a huge shopping mall	0.659
Enjoy a number of amusement and water parks	0.646
Attend festivals	0.628
Get around the area with ease	0.621
Easy to get there by plane	0.615
Play world-class golf courses	0.605
Stay in elegant historic hotels	0.580
Easy to get there by car	0.565
Find interesting crafts to take home as souvenirs	0.551
Relax in spas and hot springs	0.530
Factor 3: Exploring Natural Resources	
Explore oil fields	0.728
Learn about coal mining	0.664
See and study dinosaur remains	0.466
Factor 4: Modest Tourist Infrastructure	

Have reasonably priced meals	0.650
Find moderately priced accommodations	0.622
Have good home cooking-type meals	0.486

Factor 5: Cowboys

See cowboys and rodeos	0.782
Attend the Calgary Stampede	0.703
Follow cowboy trails	0.572

B. Image of Alberta Dimensions

Natural beauty is the area for which Alberta is favorably evaluated by most travelers. Most West Coast travelers think Alberta is better than most other areas as a place to

- *Enjoy spectacular scenery (75%),*
- *See the Canadian Rockies (71%),*
- *Hike through beautiful mountain areas (71%),*
- *See a variety of wildlife (69%),*
- *Experience the Northern Lights (Aurora Borealis) (64%), or*
- *Take rail excursions in the mountains (63%).*

With the possible exception of hiking through the mountains, these activities are all ones that describe passive enjoyment. Travelers may experience the incredible natural beauty without expending too much effort.

Frequent travelers are more likely to favor Alberta in these passive nature enjoyment activities than are those who travel less often.

Outdoor sports activities are also evaluated favorably for Alberta. Alberta is seen as an above average place to engage in a number of active outdoor sports by just over half the travelers in West Coast cities.

- *Ski at world-class resorts (58%),*
- *Go trail riding on horseback (57%),*
- *Visit winter Olympic venues (57%),*
- *Catch a trophy fresh water fish (55%),*
- *Go mountain biking (52%), or*
- *Enjoy the challenge of white water rafting (52%).*

On these attributes, frequent travelers are no more likely than others to evaluate Alberta favorably.

For many, Alberta is associated with luxury and elegance. About half or slightly fewer of the West Coast travelers also acknowledge that Alberta is at least better than most places in delivering luxury and elegance on a vacation. Alberta is viewed as a better than average place to:

- *Stay in elegant historic hotels (52%),*
- *Relax in spas and hot springs (51%),*
- *Shop and be entertained at a huge shopping mall (44%),*
- *Find interesting crafts to take home as souvenirs (43%),*
- *Attend festivals (43%),*
- *Enjoy fine dining experiences (41%),* or
- *Attend arts or cultural events (40%).*

Only a minority see Alberta as easy to access. Also grouping with the elegant activities are all the items focused on ease of access and movement throughout the province.

- *Easy to get there by plane (41%,)*
- *Easy to get there by car (35%),* and
- *Get around the area with ease (36%).*

Attributes about **exploring natural resources** – oil fields (26%), coal mining (33%), and dinosaurs (41%) – group together with a minority feeling that Alberta is a better than average place to explore these resources.

About four travelers in ten feel that Alberta is a better than average place for **reasonably priced** meals (40%) and accommodations (42%) as well as for home cooked meals (38%).

Interestingly, **cowboys are a reasonably well-known specialty of Alberta.** Two thirds recognize that Alberta is the place to *Attend the Calgary Stampede (67%)*, and about half say it is a better place to *See cowboys and rodeos (49%) and Follow cowboy trails (48%).*

Table 3-1
Activity Attribute Ratings for Alberta (Weighted)
Percent Rating: "The Very Best" or "One of the Best" or "Better than Most"

		Out-of-State Trip Volume		
	Total	Frequent (7 or more)	Moderate (3 to 6)	Light (1 to 2)
Base: Total respondents	**1,370**	**306**	**687**	**375**
Enjoy spectacular scenery	75%	81%	74%	72%
Hike through beautiful mountain areas	71	79	69	67
See the Canadian Rockies	71	79	69	69
See a variety of wildlife	69	73	68	66
Attend the Calgary Stampede	67	69	66	66
Experience the Northern Lights (Aurora Borealis)	64	70	62	63
Take rail excursions in the mountains	63	67	64	58
Ski at world-class resorts	58	62	57	55
Go trail riding on horseback	57	62	57	53
Visit winter Olympic venues	57	61	54	57
Catch a trophy freshwater fish	55	58	55	52
Go mountain biking	52	57	52	47
Enjoy the challenge of white water rafting	52	55	51	50
Stay in elegant historic hotels	52	52	54	50
Learn about Native American culture at historic Sites	51	58	49	49
Relax in spas and hot springs	51	56	50	47
Go dog sledding	50	52	49	51
Cruise on inland lakes	50	53	49	49
See cowboys and rodeos	49	57	49	42
Follow cowboy trails	48	54	47	45
Go road/tour bicycling	47	51	47	44
Shop and be entertained at a huge shopping mall	44	46	46	38
Attend festivals	43	45	42	41

Note: Shaded percents/means are significantly different from others at the 95% confidence level.

Table 3-1 (continued)
Activity Attribute Ratings for Alberta (Weighted)
Percent Rating: "The Very Best" or "One of the Best" or "Better than Most"

		Out-of-State Trip Volume		
	Total	Frequent (7 or more)	Moderate (3 to 6)	Light (1 to 2)
Basc: Total respondents	**1,370**	**306**	**687**	**375**
Find interesting crafts to take home as souvenirs	43	45	44	39
Swim in lakes	42	44	43	40
Find moderately priced accommodations	42	46	43	35
Enjoy fine dining experiences	41	44	39	40
Easy to get there by plane	41	42	42	36
See and study dinosaur remains	41	48	41	38
Attend arts or cultural events	40	41	40	40
Have reasonably priced meals	40	48	39	36
Have good home cooking-type meals	38	41	40	32
Get around the area with ease	36	38	37	34
Easy to get there by car	35	39	35	30
Learn about coal mining	33	35	35	29
Enjoy the excitement of a big city experience	32	28	33	32
Enjoy a number of amusement and water parks	29	29	28	30
Play world-class golf courses	28	30	28	24
Explore oil fields	26	29	26	23

Note: Shaded percents/means are significantly different from others at the 95% confidence level.

C. Intent To Visit Alberta

West Coast travelers were asked to indicate how likely they are to visit Alberta in the next three years or so.

One West Coast traveler in five indicates that he/she either probably (13%) or definitely (5%) will visit Alberta in the next three years (18%). Many more travelers say that they *might or might not visit Alberta (40%) or that they are unlikely to do so (41%).*

Though differences are small, frequent travelers are somewhat more likely to say they will visit Alberta (23%) than are moderate (18%) or light travelers (14%).

Table 3-2
Intent to Visit Alberta in Next 3 Years (Weighted)

Base:	Total 1,370	Out-of-State Trip Volume		
		Frequent (7 or more) 306	Moderate (3 to 6) 687	Light (1 to 2) 375
Positive Intent to Visit in next 3 years	*18%*	*23%*	*18%*	*14%*
Definitely Will Visit in next 3 years	5	8	5	2
Probably Will Visit in next 3 years	13	15	13	12
Neutral (Might or Might Not Visit)	*40*	*42*	*39*	*40*
Negative Intent to Visit in next 3 years	*41*	*33*	*42*	*45*
Probably Will Not Visit in next 3 years	32	28	33	34
Definitely Will Not Visit in next 3 years	9	5	9	11

Note: Shaded percents/means are significantly different from others at the 95% confidence level.

- Among those who say they are probably or definitely not likely to visit Alberta in the *next* three years, the majority say they are not any more likely to visit in more than three years (68%).

D. What Drives Intent To Visit?

Using a key driver analysis, we sought to determine which dimensions of the Alberta destination image are influential in determining whether West Coast travelers say they would, might or would not visit Alberta in the next three years.

The key driver analysis is similar to a regression analysis but uses the dependent variable as a dichotomy rather than a scale. The analysis is conducted twice to determine what separates those interested from those who are neutral to a future trip to Alberta and again to learn what separates those who are neutral from those who reject the idea of a trip to Alberta.

Scores are reported as an index with 100 being an average contribution. Those dimensions with an index of more than 120 are considered key drivers. Essentially, shifting the impression of Alberta to a more positive rating on those key drivers should have a positive impact on moving travelers higher on the intent to visit Alberta scale.

The 12 image dimensions that most strongly drive a positive interest in visiting Alberta focus on a variety of different themes about what tourists can do in Alberta focusing on the outdoors.

- **Observe the natural environment --**
  - *See the Canadian Rockies (278 index)*
  - *Experience the Northern lights (Aurora Borealis) (206)*
  - *Enjoy spectacular scenery (165)*
  - *Visit winter Olympic venues (159)*
  - *Hike through beautiful mountain areas (123)*
- **Participate in active outdoor activities**
  - *Enjoy the challenge of white water rafting (217)*
  - Ski at world-class resorts (166)

- **Attend special events**
  - *Attend arts or cultural events (170)*
  - *Attend the Calgary Stampede (129)*
- **Learn and explore**
  - *Learn about coal mining (154)*
  - *Explore oil fields (126)*

In addition, **ease of access to places within Alberta is a critically important perception for those interested in visiting the province.** After the Rocky Mountains, the second most important driver has to do with the perception of lack of barriers to travel around Alberta – *Get around the area with ease (247).* The other items focused on basic transportation – *Easy to get there by car (96) and Easy to get there by plane (26)* do not drive interest in visiting Alberta. But being assured one can get around easily once in Alberta is key to considering going.

Both similar and different themes emerge when we use the key driver analysis to differentiate those who are neutral (might visit) from those who do not expect to visit Alberta. Some of the enjoyment of the natural environment and outdoor activities seen above are also key drivers in this analysis. But other attractions are even more likely to differentiate these groups:

- **Observe the natural environment/Participate in outdoor activities**
  - *See the Canadian Rockies (184)*
  - *Experience the Northern lights (Aurora Borealis) (185)*
  - *See a variety of wildlife (168)*
  - *Go mountain biking (162)*
  - *Hike through beautiful mountain areas (136)*

Other differentiating dimensions are:

- **Access**
  - *Easy to get there by car (134)*
  - *Easy to get there by plane (121)*
- **Infrastructure**
  - *Have reasonably priced meals (152)*
  - *Find moderately priced accommodations (142).*
- **Activities :**
  - *Attend festivals (165)*
  - *Cruise on inland lakes (151)*
  - *Take rail excursions in the mountains (144)*

While *See cowboys and rodeos (466)* is the most important driver to differentiate these groups, *Attend the Calgary Stampede (30) and Follow cowboy trails (51)* are not. Such dramatic differences suggest that these West Coast travelers do not understand what the Stampede is or what we mean by following cowboy trails.

In reviewing both key driver analyses, we find that **the strongest component to differentiate likely visitors and non-visitors is the unique natural beauty of the area**. Three dimensions are key drivers in differentiating both likely visitors and unlikely visitors from those who are neutral to the experience.

- *See the Canadian Rockies (278 positive/184 negative)*
- *See the Northern Lights (Aurora Borealis) (206 positive/185 negative)*
- *Hike through beautiful mountain areas (123 positive/136 negative)*

Enjoy spectacular scenery (165 positive) is also a key driver of interest in visiting Alberta.

Activities that are unique or different in Alberta are next most important in differentiating likely and unlikely visitors. While none of these activities is a key driver for both groups, each is important to one group or the other.

- *Ski at world-class resorts (166 positive)*
- *Visit winter Olympic venues (159 positive)*
- *Enjoy the challenge of white water rafting (217 positive)*
- *See a variety of wildlife (168 negative)*
- *Go mountain biking (162 negative)*
- *Cruise on inland lakes (151 negative)*
- *Take rail excursions in the mountains (144 negative)*

As noted, believing one can *Get around with ease (247 positive)* is an important driver of positive interest while not believing one will find it – *Easy to get there by car (134 negative) or Easy to get there by plane (121 negative)* – drives negative interest in Alberta.

A variety of other issues differentiate either likely or unlikely future visitors to Alberta:

Cowboys

- *See cowboys and rodeos (466 negative)*
- *Attend the Calgary Stampede (129 positive)*

Festivals and Events

- *Attend arts or cultural events (170 positive)*
- *Attend festivals (165 negative)*

Reasonable Infrastructure

- *Have reasonably priced meals (152 negative)*
- *Find moderately priced accommodations (142 negative)*

Extractive Industries

- *Explore oil fields (126 positive)*
- *Learn about coal mining (154 positive)*

These ideas – especially those associated with the positive key drivers – should perhaps be included in communications about Alberta to the prospective market.

It may be even more instructive to look at those dimensions that do not drive interest in visiting Alberta at all. Those attributes that do not drive either likely or unlikely visitation to Alberta include two main categories: the activities that travelers could find in many locations, even at home and the activities that few are interested in doing. Specifically:

Activities Easily Found Elsewhere

- *Play world-class golf courses*
- *Enjoy a number of amusement and water parks*
- *Stay in elegant historic hotels*
- *Relax in spas and hot springs*
- *Enjoy the excitement of a big city*
- *Shop and be entertained at a huge shopping mall*
- *Swim in lakes*
- *Go road/tour bicycling*

Less Widespread Appeal

- *Go dog sledding*
- *Go trail riding on horseback*
- *See and study dinosaur remains*
- *Learn about native American culture*

Trying to convince West Coast travelers that Alberta has these activities is probably not worth the effort.

Interim Summary

The findings of this chapter may be summarized as follows:

- The natural beauty of Alberta's scenery is the strongest positive impression of the province among West Coast travelers. Passive observation of that beauty is more widely regarded than are active outdoor sports.
- The Calgary Stampede and other cowboy events are reasonably widely known. And while there is some recognition that Alberta has elegant historic hotels and spas and hot springs, fewer recognize the province's city excitement and natural resources such as oil and coal.
- Interest in visiting Alberta in the next three years is limited to one in five with many more being either neutral or negative to the prospect.
- The key driver analysis shows that a positive image of Alberta as an above average place to observe the beauties of nature such as the Rockies, the Northern lights, and spectacular scenery will lead to positive interest in visiting Alberta. Similar favorable evaluations of Alberta as good for white water rafting, skiing at world class resorts, hiking mountain areas also lead to positive visit interest.
- Ease of access to places in Alberta is a key driver as well. Prospective visitors must believe they can easily get around Alberta to enjoy the sights and activities.
- Activities which differentiate travelers who are neutral to an Alberta visit from those who are negative focus on ease of access, moderately priced infrastructure, and seeing cowboys and rodeos in addition to the unique natural beauty and outdoors activities.
- Activities which can easily be found elsewhere or which are of less widespread interest do not differentiate among travelers with more or less interest in visiting Alberta. Including these in advertising themes seems less useful.

Let's turn now to a look at the travel benefit segmentation.

IV. Travel Benefit Segmentation

Introduction

The purpose of this chapter is to describe the segmentation process used to identify benefit segments in the West Coast US Alberta travel market. We will look at:

- The factor analysis of items;
- The cluster analysis of travelers; and
- Definitions of the benefit segments.

We'll begin with the factor analysis.

A. Factor Analysis

The initial step in the benefit segmentation was to subject the 29 benefit descriptions used in the questionnaire to a factor analysis. The purpose of the factor analysis is to learn which of the items go together – essentially are assessed in the same way by respondents. Doing so allows us to remove the redundancy in the data and to conduct the cluster analysis on the factor scores that load strongest, not the entire set of benefit descriptors.

The five-factor solution was selected as the strongest representation of the structure of the benefit data. The five factors with their loadings are presented on the following page.

	Factor Loadings
Observing and Learning	
Learning about other cultures	0.783
Absorbing cultures that are different from our own	0.771
Learning something new and broadening my horizons	0.758
Seeking out world class natural scenery	0.707
Seeing sights I've never seen before	0.701
Exploring other countries	0.681
Finding new and different things to do and see	0.661
Stepping back in time at historic places	0.647
Appreciating the wonders of nature	0.640
Going somewhere I've wanted to go for a long time	0.599
Enjoying different local foods and cooking styles	0.562
Challenging Activities and Sports	
Challenging my abilities in summer adventures	0.844
Challenging my abilities in sport or recreational activities	0.839
Challenging my abilities in active winter sports	0.778
Challenging my abilities to rough it in nature	0.717
Seeking relaxing summer activities	0.536
Watching a game or professional sports event	0.464
Adult Elegance and Pampering	
Enjoying sophisticated dining and entertainment experiences	0.763
Luxuriating in elegant resorts	0.754
Indulging myself and being pampered	0.675
Seeking out interesting shopping experiences	0.636
Enjoying theatrical or musical performances	0.568
Family Ties	
Entertaining my children with things to see and do	0.888
Teaching my children and broadening their horizons	0.866
Reconnecting or bonding with children/other family members	0.722
Creating family memories	0.705
Rest and Relaxation	
Escaping from the stress of daily life	0.743
Resting and relaxing	0.733
Having a romantic time with a special person	0.483

B. Cluster Analysis (Segmentation)

Using factor scores for each respondent from the five factors, the participants in the survey were clustered or grouped according to shared patterns of attitudes – essentially travel benefits. The purpose of this procedure is to group together in one segment those respondents who want similar benefits from a vacation or short pleasure trip. The statistics work so that the attitudes of those in each group are most similar to each other and most different from the individuals in all other groups.

The factor analysis described previously groups items together which are viewed in the same way by participants. The cluster analysis described here groups people together who have shared patterns of attitudes on these same dimensions.

The cluster analysis solution that provided the most coherent and strongest clusters provided us with six clusters. To evaluate the structure of this cluster analysis, a sample was excluded from the first clustering and a standardized canonical discriminant function analysis was run to predict the excluded cases into the cluster analysis already created. Predictions were extremely accurate, suggesting that the segmentation structure is strong and reliable.

The six clusters created are relatively similar in size:

	Total 1,370
Cluster 1	12%
Cluster 2	15
Cluster 3	14
Cluster 4	15
Cluster 5	23
Cluster 6	20

The question used to understand the benefits participants want in a vacation or short pleasure trip asked them to indicate for each of the 29 goals, whether for them that was:

- Absolutely Essential
- Very Important
- Somewhat Important
- Not Very Important
- Would rather Not Have

Using the highest two importance categories (Absolutely Essential and Very Important), we have examined what these six groups or clusters are looking for in a vacation/short pleasure trip in terms of benefits to them-selves rather than specific activities or destinations. Essentially, the desired benefits might be provided by a variety of different activities in a number of different destinations. The benefits, however, describe how the travelers want to feel on vacation or what they want to get out of their vacation travel.

In total, the benefits desired include a broad variety of wants and needs for vacation or pleasure travel.

- **Relaxation is a key benefit**. The vast majority see *Escaping from the stress of daily life (88%) and Resting and relaxing (88%)* as very important or absolutely essential in a vacation trip.
- **Fulfilling dreams and exploring the world beyond their normal limits are also important to many.** Most are interested in *Going somewhere I've wanted to go for a long time (76%), Seeing sights I've never seen before (74%), Finding new and different things to do and see (73%).*
- **Focusing on family is also a key benefit of travel for many**. Most see a vacation as a chance for *Creating family memories (74%), Reconnecting or bonding with children/other family members (66%)*

While, as we will see, for some groups outdoor activities and sports are important benefits, for most, these activities are not key benefits of travel. None of the sports oriented benefits was selected as very important by more than 15% of the West Coast travelers.

The following descriptions of the six clusters focus exclusively on the most desired travel benefits for each group. The next chapter will explore in some depth both what else they are looking for and the ways they've found to achieve these benefits in their recent travel profiles as well as their demographics.

C. The Clusters

Cluster 1: Travel Enthusiasts (12%)

Travel Enthusiasts are more likely than other groups to consider every travel benefit important to them.

Virtually all desire *Escaping from the stress of daily life (98%), Resting and relaxing (99%)* and the excitement of new things – *Going somewhere I've wanted to go for a long time (100%), Seeing sights I've never seen before (100%), Finding new and different things to do and see (99%).*

In addition, more than nine in ten see travel as offering them:

- *Absorbing cultures that are different from our own (98%), Enjoying different local foods and cooking styles (94%), Learning about other cultures (92%), and Exploring other countries (89%);*
- *Learning something new and broadening my horizons (95%);*
- *Appreciating the wonders of nature (94%), and Seeking out world class natural scenery (94%);*

Travel Enthusiasts are also family-focused: *Creating family memories (93%), Re-connecting or bonding with children/other family members (86%).* Most Travel Enthusiasts also like *Having a romantic time with a special person (87%) and Indulging myself and being pampered (88%).*

In short, these Travel Enthusiasts see everything as a benefit for travel – but they stand out as most different from other travelers in their desire to learn about other countries and cultures.

Cluster 2: Learning/Culture Seekers (15%)

The Learning/Culture Seekers are also more likely than others to focus on learning and appreciating other cultures. They are more likely than others to see benefit from:

- *Learning something new and broadening my horizons (81%)*
- *Learning about other cultures (76%)*
- *Exploring other countries (75%)*
- *Absorbing cultures that are different from our own (69%)*

These travelers are also more interested than others in seeing new things and enjoying nature.

- *Seeing sights I've never seen before (94%)*
- *Finding new and different things to do and see (83%)*
- *Appreciating the wonders of nature (79%)*
- *Seeking out world class natural scenery (73%)*

Learning/Culture Seekers are also more interested than others in *Stepping back in time at historic places (57%).*

These travelers are less interested in all of the other benefits of travel. Their focus is single-mindedly on culture and learning.

Cluster 3: Urbane Self Indulgent Travelers(14%)

Urbane Self Indulgent Travelers want to rest and relax – but to do so by treating themselves to special rewards – often related to sophisticated experiences. They are not so interested in family, scenery, or outdoor activities as a benefit for travel.

These travelers are more likely than others to see travel benefit for themselves in:

- *Resting and relaxing (100%)*
- *Escaping from the stress of daily life (97%)*
- *Indulging myself and being pampered (72%)*
- Having a romantic time with a special person (70%)
- *Enjoying sophisticated dining and entertainment experiences (62%)*
- *Luxuriating in elegant resorts (52%)*
- *Seeking out interesting shopping experiences (46%)*
- *Enjoying theatrical or musical performances (33%)*

These travelers focus on relaxing through pampering and treating themselves well. Any destination that attracts them will need to offer such activities.

Cluster 4: Outdoor Adventurers (15%)

Outdoor Adventurers are distinguished by their interest in challenging their abilities in a variety of outdoor sports activities, in seeing natural scenery. They also want to escape from stress and rest as do most other West Coast travelers.

Outdoor Adventurers differ from others in their wider interest in achieving on vacation:

- *Appreciating the wonders of nature (85%)*
- *Seeking out world class natural scenery (77%)*
- *Seeking relaxing summer activities (65%)*
- *Challenging my abilities in summer adventures (47%)*
- *Challenging my abilities in sports or recreational activities (45%)*

- *Challenging my abilities in active winter sports (38%)*
- *Challenging my abilities to rough it in nature (32%).*

In other ways, what these travelers are looking for in vacation travel does not differ dramatically from what others want.

Cluster 5: Family-Oriented Travelers (23%)

Family-Oriented Travelers stand out from others only in the family benefits they are seeking from vacation travel. In other ways they are quite similar to all travelers.

Family-Oriented Travelers are more likely than others to seek the following benefits from travel:

- *Creating family memories (97%)*
- *Reconnecting or bonding with children/other family members (91%)*
- *Entertaining my children with things to see and do (82%)*
- *Teaching my children and broadening their horizons (81%)*

Cluster 6: Reluctant Travelers (20%)

Reluctant Travelers are less likely to be interested in any travel benefit than the typical traveler. They are most widely differentiated from others in the fact that they are less interested in viewing natural scenery, appreciating other countries and cultures, learning and seeing new sites.

These travelers are less likely than others to consider any of the following important in a vacation:

- *Going somewhere I've wanted to go for a long time (31%)*
- *Appreciating the wonders of nature (28%)*
- *Finding new and different things to see and do (27%)*
- *Seeing sights I've never seen before (23%)*
- *Seeking out world class natural scenery (13%)*
- *Enjoying different local foods and cooking styles (13%)*

- *Learning something new and broadening my horizons (8%)*
- *Stepping back in time at historic places (6%)*
- *Exploring other countries (4%)*
- *Learning about other cultures (4%)*
- *Absorbing cultures that are different from our own (4%)*

These travelers are simply not interested in most of the benefits that others receive from traveling.

The table on the following page shows the very important/absolutely essential ratings of each of the 29 travel benefits studied by the six clusters.

Table 4-1
Benefits of Travel (Weighted)
Percent Rating: "Absolutely Essential" or "Very Important"

Base: Total respondents	Total 1,370	Travel Enthusiasts 170	Learning/ Culture Seekers 203	Urbane Self-Indulgent Travelers 188	Outdoor Adventurers 210	Family-Oriented Travelers 320	Reluctant Travelers 279
Escaping from the stress of daily life	88%	98%	75%	97%	95%	95%	73%
Resting and relaxing	88	99	67	100	90	93	80
Going somewhere I've wanted to go for a long time	76	100	90	75	88	86	31
Seeing sights I've never seen before	74	100	94	70	90	85	23
Creating family memories	74	93	51	56	80	97	58
Finding new and different things to do and see	73	99	83	71	88	84	27
Reconnecting or bonding with children/other family members	66	86	36	50	69	91	53
Appreciating the wonders of nature	64	94	79	46	85	65	28
Having a romantic time with a special person	61	87	38	70	80	65	38
Learning something new and broadening my horizons	58	95	81	49	74	60	8
Enjoying different local foods and cooking styles	57	94	65	67	66	59	13
Seeking out world class natural scenery	54	94	73	37	77	50	13
Absorbing cultures that are different from our own	47	98	69	35	60	42	4
Learning about other cultures	46	92	76	28	59	42	4
Exploring other countries	45	89	75	34	59	38	4
Entertaining my children with things to see and do	43	69	8	8	46	82	29
Indulging myself and being pampered	43	88	12	72	49	42	16
Teaching my children and broadening their horizons	43	75	12	6	47	81	23
Seeking relaxing summer activities	40	70	18	30	65	46	18
Stepping back in time at historic places	38	75	57	22	44	38	6

Table 4-1 (continued)
Benefits of Travel (Weighted)
Percent Rating: "Absolutely Essential" or "Very Important"

Base: Total respondents	Total 1,370	Travel Enthusiasts 170	Learning/ Culture Seekers 203	Urbane Self-Indulgent Travelers 188	Outdoor Adventurers 210	Family-Oriented Travelers 320	Reluctant Travelers 279
Enjoying sophisticated dining and entertainment experiences	34%	76%	20%	62%	42%	26%	5%
Seeking out interesting shopping experiences	30	71	16	46	29	29	4
Luxuriating in elegant resorts	27	63	7	52	35	18	6
Enjoying theatrical or musical performances	22	56	15	33	28	14	6
Challenging my abilities in summer adventures	15	40	6	1	47	4	2
Challenging my abilities in sports or recreational activities	14	37	1	2	45	3	6
Challenging my abilities to rough it in nature	12	33	5	-	32	7	1
Challenging my abilities in active winter sports	11	30	-	3	38	4	1
Watching a game or professional sports event	10	22	5	11	20	7	5

Note: Based on the "worst case" (smallest samples at 50%/50%) all differences over 10 percentage points are significant at the 95% level.

Interim Summary

The findings of this chapter may be summarized as follows:

- Travel benefits fall into five groupings or factors based on commonalities of evaluation.
- Travel benefit clusters are created to find unique groups of travelers who share the same patterns of desired benefits. This analysis produced six travel benefit clusters.
- The travel benefit clusters are
    - Travel Enthusiasts (12%)
    - Learning/Culture Seekers (15%)
    - Urbane Self-Indulgent Travelers (14%)
    - Outdoor Adventurers (15%)
    - Family-Oriented Travelers (23%)
    - Reluctant Travelers (20%).
- The types of travel benefits desired by these clusters of travelers are very different.
    - Travel Enthusiasts want all the benefits of travel while Reluctant Travelers want almost none.
    - The Outdoor Adventurers want to be active outdoors on their vacations in nature while the Family-Oriented Travelers care primarily about teaching and entertaining their children.
    - Learning/Culture Seekers want to know about different countries and different cultures while the Urbane Self-Indulgent Travelers want to rest and relax through being pampered in a variety of ways.

Let's turn now to a look at how else these clusters are differentiated from each other.

V. The Travel Benefit Segments In Detail

Introduction

The purpose of this chapter is to describe the travel benefit segments in more detail. For each segment we will look at:

- Who are they?...demographics and psychographics;
- What do they want from travel?...travel benefits desired;
- How do they travel?...travel patterns; and
- What do they think of Alberta?...Alberta's image as a destination..

We'll begin with the Travel Enthusiasts.

A. Travel Enthusiasts (12%)

1. Who are they?

Travel Enthusiasts are likely to be young, highly educated women with children at home. Compared with other travelers, Travel Enthusiasts are more likely to be women (+10) and younger (-4.11 years on average). They are also more likely to have children at home (+11). These travelers are also more likely than others to have completed their four-year college education (+11). Seattle has fewer Travel Enthusiasts (-9) and Orange County has more (+9) when compared with all travelers.

Travel Enthusiasts think of themselves as innovators and leaders. Many more in this group say *I tend to try new things before most of my friends do (+25)*. **Travel Enthusiasts also believe their economic world looks better today**. Many more say that *We've suffered from the recent economic downturn but things are much better for us today (+16)* and they see *The economy is really beginning to pick up (+12).*

2. What do they want from travel?

As noted, Travel Enthusiasts are interested in a broad variety of benefits when they travel. **Travel Enthusiasts are much more likely than others to say travel benefits such as absorbing other cultures and enjoying sophisticated dining and shopping experiences are important to them.**

- *Absorbing cultures that are different from our own (+51)*
- *Learning about other cultures (+46)*
- *Indulging myself and being pampered (+45)*
- *Exploring other countries (+44)*
- Enjoying sophisticated dining and entertainment experiences (+42)
- Seeking out interesting shopping experiences (+41)
- Seeking out world class scenery (+40)

3. How do they travel?

Travel Enthusiasts travel often. Compared with other travelers, Travel Enthusiasts took more trips out of state for leisure in the past three years (+9 on average), with more being frequent travelers (+6) and fewer being light travelers (-7). Travel Enthusiasts are more likely than others to travel to countries other than the US and Canada (+7). In other ways, their trips do not differ from those taken by other West Coast travelers.

4. What do they think of Alberta?

Travel Enthusiasts are quite likely to say they will visit Alberta in the next three years. Fully one third say they will visit Alberta (34% vs. 18% total).

Most Travel Enthusiasts feel that Alberta is a better than average place to visit for natural scenery and outdoor activities. At the same time, Travel Enthusiasts are more likely than others to see Alberta as a place to do more sophisticated travel activities such as:

- *Enjoy the excitement of a big city experience (+26)*
- *Play world-class golf courses (+26)*
- *Enjoy fine dining experiences (+25)*
- *Have good home-cooking type meals (+23)*

- *Find interesting crafts to take home as souvenirs (+22)*
- *Attend arts or cultural events (+22)*
- *Relax in spas and hot springs (+20)*
- *Cruise on inland lakes (+20)*

B. Learning/Culture Seekers (15%)

1. Who are they?

Learning/Culture Seekers are older, well educated men and women, often from San Francisco. Compared with other travelers, Learning/Culture Seekers are older than the typical travelers (+5.79 years on average) with no children living at home (+29). More Learning/Culture Seekers are men than are the other traveler groups (+10). More are college graduates (+10) and more come from San Francisco (+11) than do other travelers.

Learning/Culture Seekers seem to feel they should travel where they want to go by air feeling no restrictions on their travel. They are less likely than others to agree that *Family is the most important thing to me today (-15) and I plan to stay in the US not even crossing the border to Canada during this period of security concerns (-8).* At the same time, they are more likely to agree that *To me all this fear of flying is silly – I just fly where I want to go on vacation (+9).* In all other attitudes, this group's profile is similar to all travelers.

2. What do they want from travel?

Travel benefits for the Learning/Culture Seekers focus on broadening their horizons through learning and culture. These travelers are more likely than others to see the following benefits as important for their travel:

- *Learning about other cultures (+30)*
- *Exploring other countries (+30)*
- *Learning something new and broadening my horizons (+23)*
- *Absorbing cultures that are different from our own (+22)*
- *Seeing sights I've never seen before (+20)*

Given the fact that these travelers are less likely to have children at home, it is not surprising to find that **they are less likely than others to seek family benefits from travel**:

- *Entertaining my children with things to see and do (-35)*
- *Teaching my children and broadening their horizons (-31)*
- *Reconnecting or bonding with children/other family members (-30)*
- *Creating family memories (-23)*

Learning/Culture Seekers are **less likely than others to be interested in rest and relaxation as a benefit of their trips.**

- Resting and relaxing (-21)
- Escaping the stress of daily life (-13)
- Seeking relaxing summer activities (-22)

These Learning/Culture Seekers are also **less likely to consider luxury a desirable benefit of travel.**

- Indulging myself and being pampered (-31)
- Luxuriating in elegant resorts (-20)

3. How Do They Travel?

Learning/Culture Seekers travel a little more often than others -- to more distant destinations. They are somewhat more likely to be frequent travelers (+6) and less likely to be moderate travelers (-5). They are more likely to have traveled to a country other than Canada or the US (+11) and less likely to have taken overnight trips within the US (-10) in the past three years. Perhaps because they are likely to travel to other countries their average length of stay is longer (+1.17 days on average).

4. What do they think of Alberta?

Learning/Culture Seekers are no more likely to say they will visit Alberta than are other travelers. **Overall, they have a positive – but not dramatically different impression of the province. Interestingly, they are especially likely to focus on the cowboys in Alberta's image.**

- *See cowboys and rodeos (+13)*
- *Follow cowboy trails (+12)*
- *Attend the Calgary Stampede (+9)*

Learning/Culture Seekers are also likely to believe that Alberta is better than average in terms of natural scenery.

- *Enjoy spectacular scenery (+9)*
- *Hike through beautiful mountain areas (+8)*
- *See a variety of wildlife (+8)*
- *Go trail riding on horseback (+8)*

C. Urbane Self Indulgent Travelers (14%)

1. Who are they?

With few exceptions, the profile of the Urbane Self Indulgent Travelers is quite similar to the West Coast market travelers overall. These travelers are women of all ages who have no children at home (+27). Their income is a little lower than average, with more in the $50,000 - $74,999 category for annual income (+8) and fewer with incomes of $75,000 or over (-7).

Urbane Self Indulgent Travelers are less likely than others to feel that *Family is the most important thing to me (-7)* and that *We've suffered from the recent economic downturn, but things are much better for us today (-5).* They are modestly more likely than others to say that *To me all of this fear of flying is silly – I just fly where I want to on vacation (+5).*

2. What do they want from travel?

Compared with other travelers, the Urbane Self Indulgent Travelers want to treat themselves specially when they travel. More than others they want to be pampered, live luxuriously, dine elegantly and shop in interesting places.

- *Indulging myself and being pampered (+29)*
- *Enjoying sophisticated dining and entertainment experiences (+28)*
- *Luxuriating in elegant resorts (+25)*
- *Seeking out interesting shopping experiences (+16)*

Since these travelers are less likely to have children they are also less likely to enjoy the family focused benefits of travel.

- *Teaching my children and broadening their horizons (- 37)*
- *Entertaining my children with things to see and do (-35)*
- *Creating family memories (-18)*
- *Reconnecting or bonding with children/other family members (-16)*

The Urbane Self Indulgent travelers are not interested in natural beauty or learning and culture. They simply want to relax and be pampered on their vacation trips.

- *Appreciating the wonders of nature (-18)*
- *Seeking out world class natural scenery (-17)*
- *Learning about other cultures (-18)*
- *Stepping back in time at historic places (-16)*

3. How do they travel?

Urbane Self Indulgent Travelers are more likely than others to fly to their destinations (+8) and less likely to drive (-9). In other ways their travel is typical of all the West Coast travelers.

4. What Do They Think of Alberta?

Urbane Self Indulgent Travelers are no more or less likely than others to say they will travel to Alberta in the next three years. Urbane Self Indulgent Travelers evaluate the province a little less favorably than do other travelers. **Major differences focus on outdoor activities of little interest to these Urbane Self Indulgent Travelers.**

- *Ski at world class resorts (-11)*
- *Go trail riding on horseback (-11)*
- *Go mountain biking (-10)*
- *Enjoy the challenge of white water rafting (-9)*
- *Go dog sledding (-9)*
- *Play world-class golf courses (-9)*

D. Outdoor Adventurers (15%)

1. Who are they?

Outdoor Adventurers are younger men and women as likely to have children as not. Outdoor Enthusiasts are more likely to be men (+10) and younger (-3.91 years of age). In other ways they do not differ from the typical West Coast traveler.

Outdoor Adventurers are likely to be innovators and very comfortable on the computer. Outdoor Adventurers are more likely than others to agree *I tend to try new things before most of my friends (+15) and I'm more comfortable on the computer than others my age are (+6).* They also are more likely to be optimistic about their economic future agreeing that *We've suffered from the recent economic downturn, but things are much better for us today (+7).*

Outdoor Adventurers are more likely than others to take time planning a vacation and to make stops along the way to their destinations. They agree more often than others that *We take a lot of time planning our vacation trips (+8) and We make lots of stops along the way to our vacation destination (+9).*

2. What do they want from travel?

The joys that Outdoor Adventurers get from vacations focus on relaxing by challenging their physical capabilities in a variety of ways. They are much more likely than others to consider the following activities essential or important in their vacations:

- *Challenging my abilities in summer adventures (+32)*
- *Challenging my abilities in sports or recreational activities (+31)*
- *Challenging my abilities in active winter sports (+27)*
- *Seeking relaxing summer activities (+25)*
- *Challenging my abilities to rough it in nature (+20)*

But Outdoor Adventurers also seek spectacular natural scenery and new sights on their vacation trips. Nature is the focus for more of this group than the typical West Coast travelers.

- *Seeking out world class natural scenery (+23)*
- *Appreciating the wonders of nature (+21)*
- *Seeing sights I've never seen before (+16)*
- *Finding new and different things to do and see (+15)*

Outdoor Adventurers are also more likely to see exploring new countries and cultures as an important benefit of travel.

- *Exploring other countries (+14)*
- *Learning about other cultures (+13)*
- *Absorbing cultures that are different from our own (+13)*

Having a romantic time with a special person is also a vacation benefit desired by the Outdoor Adventurers (+19).

3. How do they travel?

Travel patterns for Outdoor Adventurers are not different from those of the typical travelers from West Coast cities. They are more likely to say they chose a destination *To enjoy the scenery and natural beauty (+7) or To participate in a recreational activity (+5).* And, they are the least likely to say they took a vacation trip *To relax and do nothing (-6).*

4. What do they think of Alberta?

Outdoor Adventurers are more likely than other groups to say they will visit Alberta (26% or +8) and they are far less likely to be negative to the idea (-14).

Outdoor Adventurers are more likely to see Alberta delivering a better than average experience in all activities assessed. They see some outdoor activities as descriptive of Alberta much more often than others do:

- Enjoy the challenge of white water rafting (+13)
- Catch a trophy freshwater fish (+12)
- Go road/tour bicycling (+13)

But Outdoor Adventurers are also much more likely to feel that Alberta is a better than average place to find other types of activities as well. They are more likely than average to see Alberta as above average on:

- *Enjoy the excitement of a big city experience (+15)*
- *Attend arts or cultural events (+15)*
- *Have good home cooking-type meals (+14)*
- *See cowboys and rodeos (+9)*
- *Go road/tour bicycling (+13)*
- *Easy to get there by plane (+14)*

E. Family Oriented Travelers (23%)

1. Who are they?

Family Oriented Travelers, of course, are distinguished by the fact that they have children. They are more likely than all West Coast travelers to be women (+11) and to have children under 18 at home (+29). They are particularly likely to have pre-school children (+16) and school aged children (+14) and somewhat less likely to have teenagers (+7). With younger children it is not surprising to find that Family Oriented Travelers are younger than others (-2.27 year) with fewer 50 or older (-11). These travelers are also less likely than others to have completed their college education (-14). In geography, they are a little more likely to be from Seattle (+8) or Portland (+4) and less likely to be from San Francisco (-6).

Not surprisingly, Family Oriented Travelers are more likely than others to agree that *Family is the most important thing to me today (+14)*. These travelers are less likely to be innovators: *I tend to try new things before most of my friends do (-6)*. And more likely to plan their trips carefully: *We take a lot of time planning our vacation trips (+6)*.

In other ways, these Family Oriented Travelers are quite similar to the typical travelers from West Coast cities.

2. What do they want from travel?

Family Oriented Travelers simply want to focus their travel on their children. They are more likely than other groups to feel that it's important for their vacations to accomplish all of the child-centered goals:

- *Entertaining my children with things to see and do (+39)*
- *Teaching my children and broadening their horizons (+38)*
- *Reconnecting or bonding with children/other family members (+25)*
- *Creating family memories (+23)*

In other areas the views of Family Oriented travelers are quite similar to those of typical travelers from West Coast markets. They are somewhat more likely to say it's important to them to see new things and less likely to find challenging their abilities important.

- *Seeing sights I've never seen before (+11)*
- *Finding new and different things to see and do (+11)*
- *Going somewhere I've wanted to go for a long time (+10)*
- *Challenging my abilities in sports or recreational activities (-11)*
- *Challenging my abilities in summer adventures (-11).*

3. How do they travel?

Family Oriented Travelers are not frequent travelers (-13) but the details of the trips they take are similar to those by other travelers in the West Coast markets.

4. What do they think of Alberta?

Family Oriented Travelers parallel all travelers in their interest in visiting Alberta with 19% positive toward an Alberta trip. The views expressed of Alberta's qualities as a place to engage in a number of activities are also quite similar to the typical views of West Coast travelers. In no instance does the proportion describing Alberta as a better than average place to engage in an activity differ from the total by more than six points.

F. Reluctant Travelers (20%)

1. Who are they?

Reluctant Travelers differ only modestly from the typical travelers in West Coast cities. They are less likely to be women (-5) and more likely to be 50 or older (+9). In other ways they do not differ from typical West Coast travelers.

Reluctant travelers are not leaders or innovators – they are much less likely to agree that *I tend to try new things before most of my friends do (-21).* They are also less likely to say *We take a lot of time planning our vacation trips (-15) and We make lots of stops along the way to our vacation destination (-15).*

These travelers are also less likely to be optimistic about the economy. They are less likely than others to agree that *We've suffered from the recent economic downturn, but things are much better for us today (-9), The economy is really beginning to pick up (-8) and I'm confident that our household's economic situation looks good for the future (-6).*

2. What do they want from travel?

Reluctant Travelers want very little from travel. They would probably rather not go. They are particularly unlikely to want to learn anything from travel or to see new things.

- *Seeing sights I've never seen before (-51)*
- *Learning something new and broadening my horizons (-50)*
- *Finding new things to see and do (-46)*
- *Going somewhere I've wanted to go for a long time (-45)*

They also are less likely than others to want to explore other countries and cultures – even eat different foods.

- *Enjoying different local foods and cooking styles (-44)*
- *Absorbing cultures that are different from our own (-43)*
- *Learning about other cultures (-42)*

- *Exploring other countries (-41)*

Reluctant Travelers are also less likely to be interested in natural scenery than the typical traveler.

- *Seeking out world class natural scenery (-41)*
- *Appreciating the wonders of nature (-36)*

3. How do they travel?

Not surprisingly, **Reluctant Travelers are not frequent travelers** (-13). When they do travel, they are more likely to stay in the US (+7) and less likely to travel to a country other than the US or Canada (-7). They are less likely to travel by airplane (-7) and more likely to drive (+7). *Enjoying the scenery and natural beauty is* mentioned less often by these travelers as a reason for selecting a specific destination (-8). While *visiting friends and relatives* is more often a reason for travel among this group (+6).

4. What do they think of Alberta?

Very few Reluctant Travelers have any positive interest in visiting Alberta (5% or -13). Many more express no interest in going than typically is the case (+18).

On all activities in the Alberta image list, Reluctant Travelers are less likely to find Alberta above average as a place to go than are other travelers. No differences stand out to describe the character of the image these travelers hold of Alberta. They are simply less likely to hold any favorable impression of the province.

The following pages present the detailed tables of the travel benefit segments compared to the average of all combined (total sample).

Table 5-1
Demographic Characteristics of the Alberta Tourism Market (Weighted)

Base:	Total 1370	Travel Enthusiasts 170	Learning/ Culture Seekers 203	Urbane Self-Indulgent Travelers 188	Outdoor Adventurers 210	Family-Oriented Travelers 320	Reluctant Travelers 279
Gender							
Male	38	28	48	36	48	27	42
Female	62	72	52	64	52	73	57
Age							
18-29	16	21	13	14	21	18	11
30-39	29	37	15	24	36	32	28
40-49	25	25	19	26	26	31	23
50-59	20	13	32	25	15	13	24
60 or more	9	4	22	11	2	5	14
Mean age	**42.38**	**38.27**	**48.17**	**44.22**	**38.47**	**40.11**	**44.95**
Household Size							
Have children at home	43	54	14	16	42	72	44
Younger than six	19	27	3	6	16	35	18
Six – twelve	22	30	5	8	22	36	24
Thirteen – eighteen	17	16	9	7	21	24	20
No children	57	46	86	84	58	28	56
Mean household size	**2.87**	**3.15**	**2.2**	**2.22**	**2.89**	**3.48**	**2.9**
Education							
High school or less	9	7	7	7	7	13	10
College experience	40	30	32	40	36	49	42
College graduate	51	62	61	53	56	37	47
Annual Household Income							
$40,000 to $49,999	14	15	11	13	13	16	13
$50,000 to $74,999	35	31	35	43	31	33	37
$75,000 to $99,999	23	24	24	20	24	22	24
$100,000 or more	27	29	29	23	30	27	26
Mean income (000's)	**$84.2**	**$86.6**	**$84.7**	**$81.3**	**$86.9**	**$83.6**	**$83.2**

Table 5-1 (continued)
Demographic Characteristics of the Alberta Tourism Market (Weighted)

Base:	Total 1370	Travel Enthusiasts 170	Learning/ Culture Seekers 203	Urbane Self-Indulgent Travelers 188	Outdoor Adventurers 210	Family-Oriented Travelers 320	Reluctant Travelers 279
Target Market Areas							
Washington							
Seattle	21	12	18	20	19	29	23
Spokane	5	4	4	5	5	5	5
Oregon							
Portland	13	13	9	12	11	17	16
Eugene	3	3	3	2	5	2	3
California							
San Francisco	32	34	43	32	33	26	27
Orange County	12	21	10	14	13	11	9
San Diego	13	11	13	15	15	10	16

Table 5-2
Psychographic Descriptors of Potential Alberta Visitors (Weighted)
Percent Rating: "Agree Completely/Somewhat"

Base:	Total 1370	Travel Enthusiasts 170	Learning/ Culture Seekers 203	Urbane Self-Indulgent Travelers 188	Outdoor Adventurers 210	Family-Oriented Travelers 320	Reluctant Travelers 279
The Internet is a very important source of information for planning our trips	90%	91%	92%	88%	94%	94%	84%
Family is the most important thing to me today	80	87	65	73	81	94	75
I wear what I'm comfortable in regardless of what's in style	76	72	80	79	76	78	73
To me all of this fear of flying is silly – I just fly where I want to go on vacation	71	66	80	76	72	68	66
I'm more comfortable on the computer than others my age are	62	69	64	62	68	60	54
We take a lot of time planning our vacation trips	62	73	58	58	70	68	47
I'm confident that our household's economic situation looks good for the future	59	67	59	55	60	61	53
We make lots of stops along the way to our vacation destination	49	62	50	40	58	54	34
I tend to try new things before most of my friends do	47	72	51	43	62	41	26
The economy is really beginning to pick up	34	46	30	35	39	34	26
We've suffered from the recent economic downturn, but things are much better for us today	32	48	28	27	39	32	23
I find we're driving longer distances on vacation than we did before 9/11	15	23	11	12	20	13	11
Canada didn't support us in Iraq so I'm not going to take my vacation dollars to Canada	12	15	9	8	14	13	11
I plan to stay in the U.S. not even crossing the border to Canada during this period of security concerns	11	14	3	12	12	12	13
Since 9/11, we've decided to travel only to places we can drive to for vacations	10	13	6	9	13	8	10

Table 5-3
Benefits of Travel (Weighted)
Percent Rating: "Absolutely Essential" or "Very Important"

Base: Total respondents	Total 1,370	Travel Enthusiasts 170	Learning/ Culture Seekers 203	Urbane Self-Indulgent Travelers 188	Outdoor Adventurer 210	Family-Oriented Travelers 320	Reluctant Travelers 279
Escaping from the stress of daily life	88%	98%	75%	97%	95%	95%	73%
Resting and relaxing	88	99	67	100	90	93	80
Going somewhere I've wanted to go for a long time	76	100	90	75	88	86	31
Seeing sights I've never seen before	74	100	94	70	90	85	23
Creating family memories	74	93	51	56	80	97	58
Finding new and different things to do and see	73	99	83	71	88	84	27
Reconnecting or bonding with children/other family members	66	86	36	50	69	91	53
Appreciating the wonders of nature	64	94	79	46	85	65	28
Having a romantic time with a special person	61	87	38	70	80	65	38
Learning something new and broadening my horizons	58	95	81	49	74	60	8
Enjoying different local foods and cooking styles	57	94	65	67	66	59	13
Seeking out world class natural scenery	54	94	73	37	77	50	13
Absorbing cultures that are different from our own	47	98	69	35	60	42	4
Learning about other cultures	46	92	76	28	59	42	4
Exploring other countries	45	89	75	34	59	38	4
Entertaining my children with things to see and do	43	69	8	8	46	82	29
Indulging myself and being pampered	43	88	12	72	49	42	16
Teaching my children and broadening their horizons	43	75	12	6	47	81	23
Seeking relaxing summer activities	40	70	18	30	65	46	18
Stepping back in time at historic places	38	75	57	22	44	38	6
Enjoying sophisticated dining and entertainment experiences	34	76	20	62	42	26	5

Table 5-3 (continued)
Benefits of Travel (Weighted)
Percent Rating: "Absolutely Essential" or "Very Important"

Base: Total respondents	Total 1,370	Travel Enthusiasts 170	Learning/ Culture Seekers 203	Urbane Self-Indulgent Travelers 188	Outdoor Adventurer 210	Family-Oriented Travelers 320	Reluctant Travelers 279
Seeing out interesting shopping experiences	30	71	16	46	29	29	4
Luxuriating in elegant resorts	27	63	7	52	35	18	6
Enjoying theatrical or musical performances	22	56	15	33	28	14	6
Challenging my abilities in summer adventures	15	40	6	1	47	4	2
Challenging my abilities in sports or recreational activities	14	37	1	2	45	3	6
Challenging my abilities to rough it in nature	12	33	5	0	32	7	1
Challenging my abilities in active winter sports	11	30	0	3	38	4	1
Watching a game or professional sports event	10	22	5	11	20	7	5

Table 5-4
Out-of-State Overnight Travel (Weighted)
(Past 3 Years)

Base:	Total 1,370	Travel Enthusiasts 170	Learning/ Culture Seekers 203	Urbane Self-Indulgent Travelers 188	Outdoor Adventurers 210	Family Oriented Travelers 320	Reluctant Travelers 279
Travel Volume:							
Frequent Travel (7 or more trips)	23%	28%	28%	21%	26%	18%	18%
Moderate Travel (3 to 6 trips)	50	51	45	52	50	57	45
Light Travel (1 to 2 trips)	27	20	26	27	25	26	37
Average number of trips	**5.16**	**6.06**	**5.47**	**5.17**	**5.43**	**4.89**	**4.50**

Table 5-5
Recent Travel: Trip Characteristics (Weighted)
(Past 3 Years)

Base: Total Trips	Total 5963	Travel Enthusiasts 841	Learning/ Culture Seekers 954	Urbane Self-Indulgent Travelers 794	Outdoor Adventurers 958	Family Oriented Travelers 1309	Reluctant Travelers 1107
Primary Destination							
United States (Net)	*81%*	*75%*	*71%*	*85%*	*81%*	*84%*	*88%*
Pacific Region	30	27	24	22	35	37	28
Mountain Region	25	23	23	29	25	22	31
Canadian Provinces/Territories (Net)	*5*	*4*	*4*	*5*	*7*	*4*	*6*
British Columbia	4	3	3	4	5	3	4
Alberta	<1	<1	<1	<1	<1	<1	<1
Other Country (Net)	*13*	*20*	*24*	*9*	*11*	*10*	*6*
Mode of Major Travel							
Airplane	55%	57%	60%	63%	55%	50%	48%
Car/ RV/ Truck	39	38	33	30	41	44	46
Cruise Ship	3	3	5	3	1	3	2
Reason for Destination Choice							
To visit family or friends	34%	30%	31%	36%	32%	36%	40%
To relax and do nothing	17	20	13	21	11	17	20
To enjoy the scenery and natural beauty	15	20	18	11	22	14	7
To participate in a recreational activity	10	9	7	12	15	9	11
To watch others perform in shows or sporting events	4	3	4	4	5	3	5
Personal business	4	2	5	4	3	4	4
To learn something new	3	3	7	2	2	3	1
Average Length of Stay	**5.57**	**5.66**	**6.40**	**5.32**	**5.18**	**5.51**	**5.39**

Table 5-6
Intent to Visit Alberta in Next 3 Years (Weighted)

Base:	Total 1,370	Travel Enthusiasts 170	Learning/ Culture Seekers 203	Urbane Self-Indulgent Travelers 188	Outdoor Adventurers 210	Family Oriented Travelers 320	Reluctant Travelers 279
Positive Intent to Visit in next 3 years	*18%*	*34%*	*15%*	*17%*	*26%*	*19%*	*5%*
Definitely Will Visit	5	16	3	3	5	5	1
Probably Will Visit	13	18	12	14	21	14	4
Neutral (Might/Might Not Visit)	*40*	*38*	*43*	*41*	*47*	*39*	*35*
Negative Intent to Visit in next 3 years	*41*	*28*	*41*	*42*	*27*	*40*	*59*
Probably Will Not Visit	32	26	32	28	24	30	46
Definitely Will Not Visit	9	2	9	14	3	10	13

Table 5-7
Activity Attribute Ratings for Alberta (Weighted)
Percent Rating: "The Very Best" or "One of the Best" or "Better than Most"

Base: Total respondents	Total 1370	Travel Enthusiasts 170	Learning/ Culture Seekers 203	Urbane Self-Indulgent Travelers 188	Outdoor Adventurers 210	Family-Oriented Travelers 320	Reluctant Travelers 279
Enjoy spectacular scenery	75%	80%	84%	74%	78%	73%	67%
Hike through beautiful mountain areas	71	76	79	63	80	68	63
See the Canadian Rockies	71	77	77	64	78	69	66
See a variety of wildlife	69	76	77	65	74	65	60
Attend the Calgary Stampede	67	70	76	64	70	65	59
Experience the Northern Lights (Aurora Borealis)	64	71	68	60	72	61	57
Take rail excursions in the mountains	63	75	70	60	69	57	54
Ski at world-class resorts	58	74	58	47	67	58	47
Go trail riding on horseback	57	73	65	46	66	54	46
Visit winter Olympic venues	57	74	53	50	68	58	41
Catch a trophy freshwater fish	55	71	60	48	67	54	41
Go mountain biking	52	68	52	42	60	50	43
Enjoy the challenge of white water rafting	52	64	52	43	65	50	42
Stay in elegant historic hotels	52	68	56	49	62	50	37
Learn about Native American culture at historic sites	51	67	58	49	61	45	36
Relax in spas and hot Springs	51	71	51	44	59	51	35
Go dog sledding	50	64	50	41	61	51	40
Cruise on inland lakes	50	70	56	46	54	48	34
See cowboys and rodeos	49	58	62	46	58	43	38
Follow cowboy trails	48	57	60	42	61	43	35
Go road/tour bicycling	47	62	49	40	60	46	33
Shop and be entertained at a huge shopping mall	44	63	42	37	49	45	32

Table 5-7 (continued)
Activity Attribute Ratings for Alberta (Weighted)
Percent Rating: "The Very Best" or "One of the Best" or "Better than Most"

Base: Total respondents	Total 1370	Travel Enthusiasts 170	Learning/ Culture Seekers 203	Urbane Self-Indulgent Travelers 188	Outdoor Adventurers 210	Family-Oriented Travelers 320	Reluctant Travelers 279
Attend festivals	43	62	38	38	53	47	26
Find interesting crafts to take home as souvenirs	43	65	36	42	54	42	30
Swim in lakes	42	57	45	36	50	42	31
Find moderately priced accommodations	42	60	44	37	52	40	27
Enjoy fine dining experiences	41	66	36	39	51	37	26
Easy to get there by plane	41	59	34	35	55	42	25
See and study dinosaur remains	41	56	48	35	49	39	29
Attend arts or cultural events	40	62	34	38	55	38	24
Have reasonably priced meals	40	59	41	38	49	39	25
Have good home cooking-type meals	38	61	38	32	52	35	21
Get around the area with ease	36	55	32	38	45	34	23
Easy to get there by car	35	53	36	31	39	31	25
Learn about coal mining	33	49	33	27	42	32	23
Enjoy the excitement of a big city experience	32	58	25	26	47	31	15
Enjoy a number of amusement and water parks	29	50	24	23	39	27	16
Play world-class golf courses	28	54	19	19	37	27	18
Explore oil fields	26	43	23	22	35	22	18